

# **SHELF LOGIC®**

# **ENTERPRISE EDITION**

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**Version 3.0**

# **USER'S MANUAL**

**September 2013**

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# Welcome to Shelf Logic® Enterprise Edition

Shelf Logic® Enterprise Edition is a simple to use yet powerful program specifically designed to create planograms for shelving, pegboard and slat wall merchandising displays. Using the Smart Plan features, even the most complex planograms can be created in minutes by selecting your products and letting Shelf Logic® arrange them. Other automatic features such as Smart Shelf and Next Location make item placement as simple as clicking your mouse.

Your planograms can be created and printed using actual photographic images or line art representations that are scaled to the same dimensions of width, height and depth as the actual products. Statistical data is provided for the construction of the display, and for doing sophisticated space and sales analysis.

Shelf Logic® Enterprise Edition has several features that make it easy to incorporate your planograms into web pages, catalogues, documents and email. You can also share your planograms with customers and staff even if they don't have Shelf Logic® Enterprise Edition installed.

## Getting Help

### About This User Manual

This manual provides detailed information on all of the features of Shelf Logic® Enterprise Edition, as well as tips for creating and maintaining your database, image files, and merchandising display plans.

Like the program itself, this manual will keep growing and evolving in response to the needs of our users. Updates will be available for download from the Shelf Logic® web site user section. We welcome your comments on corrections or improvements that will help make this manual more useful. Please email to:

[Help@ShelfLogic.com](mailto:Help@ShelfLogic.com)

This manual assumes that you have a basic working knowledge of Microsoft Windows®. If you are not familiar with Windows® terms such as dialogue boxes, mouse-clicks, menus, Windows Explorer, etc., consider reading Microsoft's guide entitled "Getting Started with Microsoft Windows®" or another suitable tutorial. A basic working knowledge of Windows® and its features is essential to effective use of any software program.

This manual assumes that you are using a standard right-handed mouse with the left button set as the primary button. When the manual refers to clicking and double clicking, it is always with the left mouse button, unless otherwise specified. If you are left-handed, you can switch the left and right mouse buttons through the Windows® Control Panel.

When referring to a specific key on the keyboard, the name of the key will appear in brackets, for example <enter> means press the enter key. A keyboard combination such as <Ctrl + S> means you hold down the Ctrl key while pressing the letter S, (or whichever letter applies to the specific command).

Instructions for executing menu commands are shown as menu name/command name:

File/Save As – first click on File Menu then select the Save As command.

## Technical Support

Normal operating hours for the Technical Support Department are as follows:

Monday – Friday 9:00 AM - 4:00 PM, EST  
**Phone (845) 796-3260**

All questions regarding the operation of Shelf Logic® software should be sent to:

[Help@ShelfLogic.com](mailto:Help@ShelfLogic.com)

Response time is usually within one business day. When contacting technical support you must include the following information.

- Company name
- User name and phone number.
- Shelf Logic® product and version number.
- Detailed description of the problem that occurred including any error message.

## Shelf Logic® Web Site User Section

You will need a User ID and password to gain access to the web site User Section. Your User ID and password can be found in the introduction letter that is shipped with your software. If you do not have your User ID and password, please contact Technical Support. Some of the features of this section are:

- Software Registration
- User Manual updates for download.
- Program updates for download.
- Shelf Logic® Reader Software for download.
- Tips and FAQ's (frequently asked questions).

## System Requirements

- PC compatible Windows 98, ME, NT, 2000, XP, Vista, Windows 7, Windows 8
- 20 MB available hard disk space

# Installing Shelf Logic® Enterprise Edition

## Instructions for First Time Installations

1. Download your Shelf Logic program from our website: [www.shelflogic.com](http://www.shelflogic.com).
2. On the website, logon to the user section with your user name and password.  
You will see a link to download Shelf Logic Enterprise Edition. When asked, save the file to disk. DO NOT open the file.
3. After downloading Shelf Logic Enterprise Edition, you will have a file called **Setup.exe**. Double-click on this file to start the installation.
4. Follow the installation instructions.
5. **IMPORTANT:** This must be installed onto the C: drive where the installation program puts it. You cannot move the program or its parts after installation.  
You cannot install this product on any version of Windows Server.

The installation program will install Shelf Logic® Enterprise Edition into a folder named “C:\Program Files\Shelf Logic Enterprise Edition”.

- A subfolder named Backup will be created for storing backup files.
- A subfolder named DataFile will be created for planogram and database files.
- A subfolder named Images will be created for storing photo image files.
- A subfolder named Reports will be created for storing report files.
- A subfolder named Samples, which contains a practice database and demo plan files.
- A Shelf Logic® Enterprise Edition Program Group will be created on the Windows® Start Menu with icons for starting Shelf Logic, moving Shelf Logic® and complete Uninstall.
- A desktop shortcut for Shelf Logic® Enterprise Edition will also be created.

# Shelf Logic Trial Version

When Shelf Logic is first installed, it automatically becomes a trial version. It needs to be registered in order to become a fully working copy. If the program is not registered, you will see this screen when the program starts:



**Figure 1. The Registration Dialog Box**

- If you are using Shelf Logic as a trial version, then click on the “Continue with Trial” button.
- If you purchased Shelf Logic and wish to register it, then click on the “Register Program” button. See the next section for information on registering your program.
- If you haven’t purchased Shelf Logic and wish to do so. Click on the “Purchase Software” button and you will be taken to our website so that you can purchase the product.
- You can click on the “Cancel” button to exit the program.

# Registering Shelf Logic®

After installing the program (but before running it for the first time) you will need to register your Shelf Logic® software and obtain a program key code. You can register on our website or over the phone by calling our office.

To start the registration, click on the “Register Program” button. You will then be presented with a registration number. This registration number is turned into a program unlock key by calling our offices to get a program key, or by going to our web site and registering it online. The URL is:

<http://www.shelflogic.com/register.htm>

Keep the register dialog box open while you get the program key. If it is closed, you will get a different registration number each time you open the registration dialog box.

Once you get the program key, enter it into the program key field and click on the “Register Program” button. The program will then be registered and fully functional. This only needs to be done once.

The key code you will be issued is only valid for one installation so you will need to obtain a new key code for each copy of Shelf Logic® Enterprise Edition that you purchase.

If you need assistance in registering your software, please contact Technical Support.



***Note: Please refer to the section on Removing Shelf Logic® which contains important information about moving, reinstalling, and re-registering your Shelf Logic® software.***



# Upgrading From a Previous Version

If you are currently using Shelf Logic® Master Edition, you must contact Tech to upgrade and convert your Master Edition plan files and databases to Shelf Logic® Enterprise Edition.

## Moving Shelf Logic® Enterprise Edition

Please follow these instructions carefully in case you need to move Shelf Logic® Enterprise Edition to a different computer or reinstall at a later date:

1. Copy the DataFile folder, Images folder, and Reader folder to a removable medium (floppy disk, zip disk, tape or network drive) before running the remove program. You will need to transfer these files to the new installation.
2. From the Windows Start Menu, select Shelf Logic® Enterprise Edition/Move.
3. Shelf Logic® Enterprise Edition will be removed from your computer and a **removal code** will be displayed on your screen.
4. **\*\*You must write down this removal code and store it in a safe place or send it directly to [help@shelflogic.com](mailto:help@shelflogic.com). \*\***



***Note: You must have the removal code when you reinstall and reregister Shelf Logic® Enterprise Edition. This removal code is valid for only one reinstall so you must have a new removal code each time the software is moved.***

## Reinstalling Shelf Logic® Enterprise Edition

1. Reinstall Shelf Logic® Enterprise Edition following the instructions at the beginning of this section.
2. Copy your data files to C:\Program Files\Shelf Logic Enterprise Edition\DataFile.
3. Copy your image files to C:\Program Files\Shelf Logic Enterprise Edition \Images.
4. Copy your zipped Reader files to C:\Program Files\Shelf Logic Enterprise Edition \Reader.
5. Run Shelf Logic® Register according to the instructions above.



***You will need both the removal code and the new registration number when contacting Technical Support.***

### Starting Shelf Logic<sup>®</sup> Enterprise Edition

Once installation is complete, you may begin using and learning Shelf Logic<sup>®</sup> Enterprise Edition. From the Windows Start Menu, select Programs, then the Shelf Logic<sup>®</sup> Enterprise Edition Program Group. Click the Shelf Logic<sup>®</sup> Enterprise Edition icon to run the program, or double-click the Shelf Logic<sup>®</sup> Enterprise Edition desktop icon.

A practice database and plan files have been included for use during the learning process. To access the practice files:

1. Click File/Open
2. Double-click the “C:\Program Files\Shelf Logic Enterprise Edition\” folder.
3. Double-click the Samples folder.
4. Double-click one of the practice files. This will open a practice planogram and activate the practice database.



# Overview

## Capabilities

Number of items per database file:	Unlimited
Maximum plans opened at one time	10
Maximum faces on a plan:	1500
Maximum Items stacked behind each other in a facing:	255
Maximum shelves on a plan:	250
Maximum plan width:	250 Feet
Maximum plan height:	250 Feet
Maximum number of databases:	Unlimited
Maximum number of databases per plan:	1
Maximum Levels of Undo and Redo:	100

## Plan Scaling

Zoom Ratio: 1.5:1 to 63:1 (at 640x480 monitor resolution)

Scale Ratio: 5 1/4-feet/screen inch to 1 1/2-inches/screen inch

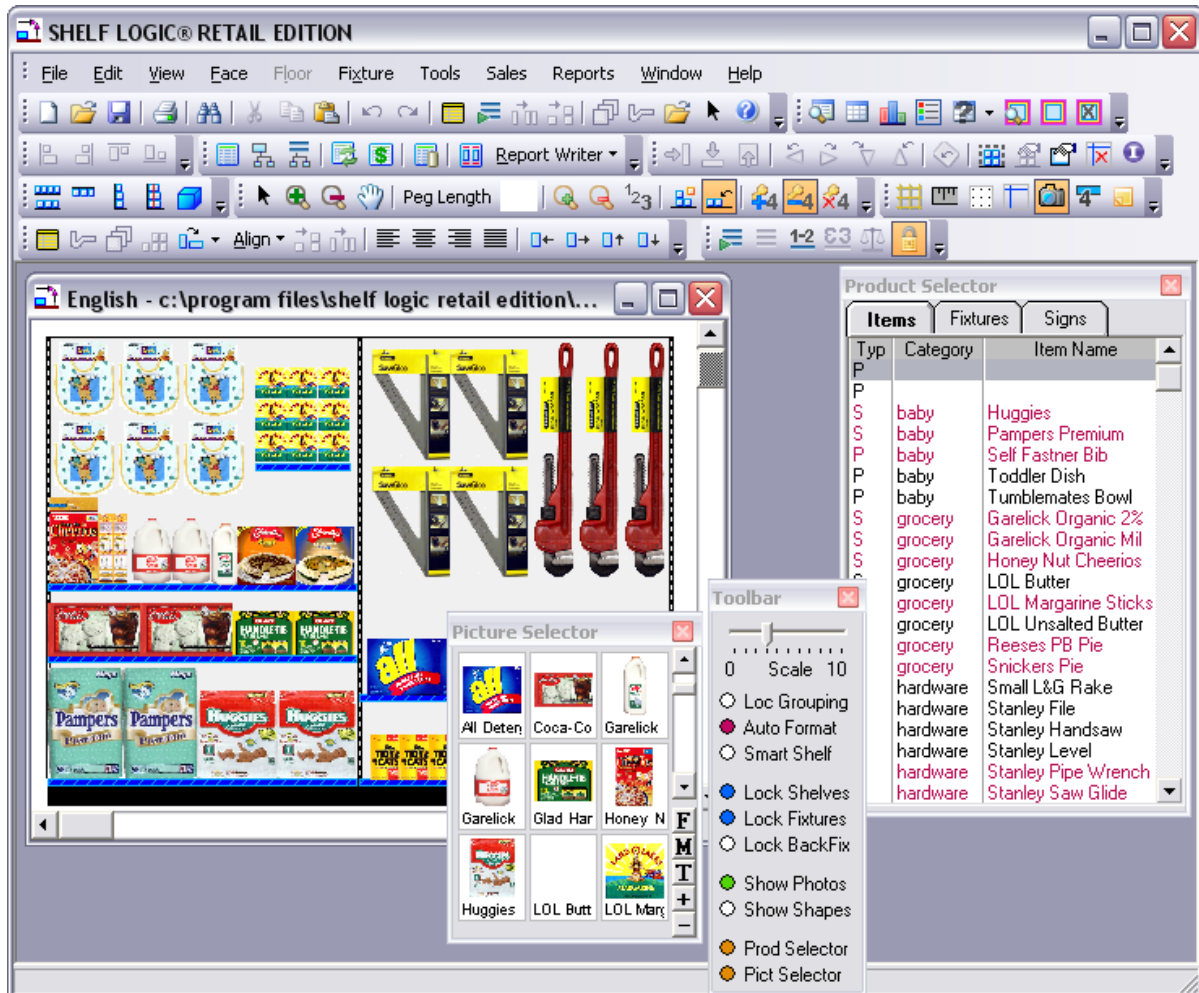
Viewing capacity: 45 x 27 feet to 3/4 x 1/14 feet (at 640x480 monitor resolution)

Item measurement accuracy to 1/16 inch

# Screen Elements

## Main Window

When Shelf Logic Enterprise Edition is started, all activities take place on the Main Window, as shown in the figure below.



At the top of the window is the **Menu Bar**, which contains all of the commands and features of Shelf Logic® Enterprise Edition.

Below that are the various **Button Bars** that have shortcut commands on them.

Below that is the **Plan Window**. This can contain up to 10 opened Plans or Floor Plans. One plan window is visible above. Along with that plan window is the **Picture Selector**, which contains pictures of all products in your database and lets you select them to place onto your plans..

Next to the Product Picture Selector is the **Toolbar**. This has a scroll bar to control the scale of the plan and various feature switches. It indicates if shelves are locked, if photos are shown and more. You can also turn these features on and off.

On the right of the Plan Window is the **Product Selector**, which has a list of all products in your database and lets you select them to place onto your plans. The Product List Selector also has list of fixtures and signs. When working on Floor Plans, this will show the planograms available, fixtures and obstructions.

The Picture Selector, Product List Selector and Toolbar can be moved anywhere within the Plan Window. In addition, there is an option to dock the Product and Picture Selectors so they remain on the right side of the Plan Window.

# Rulers

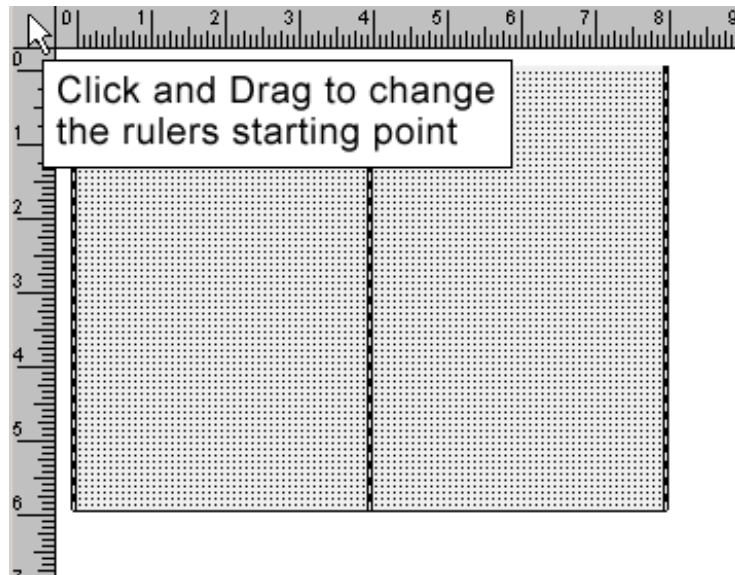
Shelf Logic has rulers that can be made visible or hidden. The ruler can start measuring from the top of the display downwards or be set to measure from the bottom of the display upwards.

In addition, the ruler's starting point can be changed to start at any location. This is very useful for measuring the distance between objects.

By default, the ruler start measuring from the top left of the display. This can be changed in the Display Setup Dialog Box. There you will find a checkbox that indicates the ruler will start measuring from the bottom of the display upwards.

## Changing the Rulers Starting Point

The ruler's starting point is changed by clicking in the box between the rulers and dragging the starting point around until the desired position is found. When you let go of the mouse, the rulers will change to reflect the new ruler starting points.



**Figure 3. Changing the Ruler Starting Point**

## Resetting the Rulers Starting Point

You can reset the rulers starting point to the upper left by double-clicking on the gray box between the rulers.

## Hiding Rulers

You can toggle the display of the ruler from the View Menu. There is a selection called "Show Ruler". Selecting this turns the ruler display on and off.

# How to Execute Commands

The many features of Shelf Logic<sup>®</sup> Enterprise Edition can be executed by using menus, keyboard shortcuts, button and tool bars, mouse clicks, or drag and drop. Before executing some commands, you must first select a shelf or item on which the command will be performed. Clicking the left mouse button on a shelf or item selects and highlights it in bright red.

## Menus

There are two ways to execute commands from the menus:

1. Using the mouse, click the menu name then click the command on the drop-down menu.
2. Using the keyboard, hold down <Alt> and press the underlined letter in the menu name, then press the underlined letter in the command name.

## Hot Buttons

The Hot Buttons located on the Button Bar are shortcuts to some of the more frequently used features. All of the Hot Button commands can also be found in the menus.

## Shortcut Menu (Right Mouse Button)

In addition to the main menus, there are several shortcut menus that can be accessed by clicking the right mouse button over an object. These menus are object-sensitive, which means that the available options will be different depending upon the object you right-click on. We suggest experimenting with the right mouse button feature as much as possible. Once familiar with the different menus, you will find them to be considerable step-savers.

- Right clicking over a shelf will select the shelf and open a Shortcut Menu of commands relating to shelf arrangement.
- Right clicking over the plan area will open a Shortcut Menu of commands relating to display setup.
- Right clicking over an item in the Product List Selector Window will select it and open a Shortcut Menu of commands relating to Product Information.
- Right clicking over an item in the Plan Window selects it and opens a Shortcut Menu relating to item placement in the plan.

## Double-Clicking an Object

Double-clicking an object in the plan window, such as a shelf or item, opens a maintenance menu that allows you to change the shelf dimensions or update the item in the database. Double-clicking on selected items on the plan lets you edit those items in the Product information window. Double-clicking the plan area opens the Display Setup dialogue box. Double-clicking an item in the Product List Selector Window places the item on the plan. If you have Location Grouping turned on, then double-clicking on a product face will open the Location Group Window.

## Drag and Drop

Items can be dragged from the Product Selection Window and dropped onto the plan. To drag an item, select it from the Product List Selector Window and hold down the left mouse button as you move the mouse. Release the mouse button to place the item on the plan.

When dragging and dropping an item, the Smart Shelf feature and Snap-To features still apply if turned on, but Next Available Location has no effect.



# Keyboard Shortcuts

Some frequently used commands can be executed directly from the keyboard by holding down <Ctrl> or <Alt> and pressing a corresponding letter. If a particular command has a Keyboard Shortcut, it will appear on the menu next to the command name as follows: <Ctrl + letter>.

Shortcut keys can also be created by the Keystroke Manager, which can assign any command to a key.

## Reference List of Keyboard Shortcuts

Add Items to Database	<Ctrl + I>
Add Items to RIP Queue	<Ctrl + A>
Product Information	<Ctrl + M>
File/Save	<Ctrl + S>
Open Existing Plan	<Ctrl + O>
Show Guidelines/Turn off Guidelines	<Ctrl + G>
Show Peg Holes/Turn Off Peg Holes	<Ctrl + H>
Show Photos/Turn Off Photos	<Ctrl + T>
Show By Quantity Sold	<Ctrl + Q>
Display Setup	<Ctrl + D>
Undo	<Ctrl + Z>
Redo	<Ctrl + R>
Cut	<Ctrl + X>
Copy	<Ctrl + C>
Paste	<Ctrl + V>
Find (Items on Planogram)	<Ctrl + F>
Zoom In	F8
Zoom Out	F7
Print Planogram	<Ctrl + P>
Scroll Forward through Product Information	<Alt + D>
Scroll Backward through Product Information	<Alt + B>
Exit Shelf Logic®	<Alt + F4>
Copy Selected Area	<Ctrl + Drag>



# List of Menus & Commands

## File Menu

**New Planogram** – Starts a new Planogram.

**New Window** – Duplicates the current plan in another window.

**Open** – Opens an existing plan or floor plan.

**Save** – Saves the current plan.

**Save As** – Saves a copy of the current plan in a new file with a new name.

**Close** – Closes a plan.

**Delete Plan** – Permanently deletes a plan or floor plan from your hard drive.

**New Database** – Creates a new database file for items.

**Unit of Measure** – Toggles between English and Metric unit of measure.

**Import Item Database** – Imports data into the items database from other applications.

**Export Item Database** – Export the items database for use with other applications.

**Export Plan** – Exports the plan data for use in other applications.

**Print Setup** – Change printers and printer options, such as paper orientation.

**Print Plan** – Set print options and print the planogram.

**Recent Plans** – This displays and lets you select the 5 most recent plans opened

**Exit** – Closes Shelf Logic® Enterprise Edition.

## Edit Menu

**Undo** – Reverses up to 10 operations.

**Redo** – Reverses the last Undo operation.

**Delete** – Removes one or more items or shelves from a plan.

**Cut** – Deletes an object and stores it in the clipboard for reuse.

**Copy** – Copies an object to the clipboard for reuse.

**Paste** – Places the clipboard contents in a new location.

**Find** – Finds and highlights matching items in a plan.

**Copy Image to Clipboard** – Copies the selected area of the plan to the Windows clipboard for pasting into another application.

**Enter Note** – This will let you enter a 'post-it' style note.

**Field Mapping** – Lets you rename fields to another field name.

# View Menu

## Display

- Show Product Photos** – Turns photo image display on and off.
- Show Product Shapes** – Turns product shapes display on and off.
- Display Item Text** – Turns display of product info in the item box
- Show Product Peg Labels** – Turn peg label display on and off.
- Show Product Pegholes** – Turns display of pegholes on products on and off.
- Show Pegholes** – Turns display of pegholes on and off.
- Show Peg Labels** – Turns display of peg labels on and off.
- Show Notes** – Turns the display of notes on and off.
- Show Shelf Numbers** – Turns display of shelf number tags on and off.
- Show Ruler** – Turns Ruler display on and off.
- Show Grid** – Turns Grid display on and off.
- Show Guidelines** – Turns display of guidelines on and off.
- Clear All Guidelines** – Clears all guidelines.

## Views

- Front** – Displays the plans front view.
- Top** – Displays the plans top view.
- Side** – Displays the plans side view.
- Cross Section** – Displays the plans side view with moveable cross sections.
- 3D** – Displays the plan in 3D view.
- Top View Options**
  - Show All Items** – The top view displays shelf and peg items
  - Show Shelf Items** – The top view displays only shelf items
  - Show Peg Items** – The top view displays only peg items

## Setup

- Display Setup** – Displays plan setup window.
- Auto Format** – Lets you configure the Auto Format feature.
- Grid Setup** – Lets you specify grid options.
- Snap to Setup** – This lets you turn various snap to features on and off.
- Peg Properties** – Displays and lets you change the peg hook properties.

## Zoom

- Zoom in** – Enlarges the view of a section of the plan.
- Zoom out** – Shrinks the view to display more of the plan.
- Zoom to Plan** – Sizes the plan to best fit the screen.
- Zoom to Select Box** – First select an area of the plan and this sizes that area to fit the screen.
- Scale** – Changes the scale of the plan on the screen.

- Location Grouping** – Turns grouping of similar items on and off.
- Location Properties** – Set properties for the selected location.
- Plan Properties** – Set properties for the plan in current window.
- Floor Properties** – Set properties for the floor plan in current window.

**Show Product List Selector** – Turns display of Product List Selector on and off.  
**Filter List Selector** – Create filter for Product List Selector to show only selected items.  
**Show Product Picture Selector** – Turns display of Product Picture Selector on and off.  
**Filter Picture Selector** – Create filter for Product Picture Selector to show only selected items.  
**Show Floating Toolbar** – Turns display of Toolbar on and off..  
**Preferences** – Set defaults for some of the program features.  
**Info** – Displays information about the current plan.

# Face Menu

**Product Info** – Add items or change existing items in the Items database file.

**Change Hook Length** – Edit peg hook length for an item already on the planogram.

**Number in Stack** – Define the number of items to be placed in a stack.

**Change Merch Style** – Change the merchandising style for selected faces.

## Flip

**Side** – Flip item onto its side

**Top** – Flip item onto its top

**Front** – Flip item onto its front

**Turn 90° CCW** – Turn item 90 degrees counter-clockwise

**Turn 90° CW** – Turn item 90 degrees clockwise

**Turn 180° CCW** – Turn item 180 degrees

**Turn to Normal** – Turn item back to its normal upright position

**Rotate** – Rotate item any amount on X, Y or Z axis.

**Duplicate Up** – Duplicates the highlighted item upwards.

**Duplicate Right** - Duplicates the highlighted item to the right.

## Align

**Left** – Align products to the left

**Right** – Align products to the right

**Top** – Align products to the top

**Bottom** – Align products to the bottom

**Center** – Align products to the center

**To Peghole** – Align products to the nearest peghole

## Justify

**Left Justify** – Products are left justified

**Right Justify** – Products are right justified

**Center Justify** – Products are Center justified

**Spread Out** – Products are evenly spread out

**Enter Justify Gap** – Enter amount of space between items when justified.

## Move

**Nudge Up** – Move the selected products up a tiny amount.

**Nudge Down** – Move the selected products down a tiny amount.

**Nudge Left** – Move the selected products left a tiny amount.

**Nudge Right** – Move the selected products right a tiny amount.

**Bring to Front** – This brings the selected item(s) to the foreground.

**Bring to Back** – This brings the selected item(s) to the background.

**Next Face** – Move the selection to the next face on the plan.

**Previous Face** – Move the selection to the previous face on the plan.

**Mirror Plan** – Reverse the plan so it's a mirror image of itself

**Update from Database** – Updates item details that have been modified since the plan was created.

# Fixture Menu

## Shelf

**Add Shelf** – Adds one or more shelves to the plan.

**Change Shelf** – Changes shelf dimensions or placement of an existing shelf.

**Renumber Shelf** – Change shelf numbering from top to bottom or bottom to top

**Mirror Faces on Shelves** – Reverse order of faces on selected shelves.

**Weight of All Products on Shelf** – Total weight of products on a shelf

**Lock Shelves** – Prevents shelves from being moved.

## Fixture

**Add Fixture** – Adds one or more fixtures to the plan.

**Change Fixture** – Changes Fixture dimensions or placement of an existing Fixture.

**Fill Fixture with Product** –

**Lock Fixture** – Prevents fixtures from being moved.

## Background Fixture

**Add Background Fixture** – Adds one or more Sections to the plan.

**Change Background Fixture** – Changes Section dimensions or placement of an existing Section.

**Lock Background Fixture** – Prevents Sections from being moved.

## Tools Menu

**Arrow** – Toggles between the normal arrow pointer and the Tool Bar pointers.

**Magnify Up** – (Zoom In) Turns the pointer into a magnifying glass to enlarge the view of an item, shelf or section of the plan (changes the display only, not the actual plan). Each mouse click enlarges the view by one increment.

**Magnify Down** – (Zoom Out) Turns the pointer into a magnifying glass to shrink the view and display more of the plan (changes the display only, not the actual plan). Each mouse click shrinks the view by one increment.

**Grab** – Turns the pointer into a hand and moves the plan up/down or right/left within the Plan Window (an alternative to Scroll Bars).

**Smart Shelf** – Turns the Smart Shelf automatic features on and off.

**Next Available Location** – Turns the automatic placement feature on and off.

**Item Key Numbering** – Turns manual key numbering mode on and off.

**RIP Processor** – Lets you add products to the RIP Queue for rapid product placement.

**RIP2 Processor** – Lets you add products to the RIP2 Queue for rapid product placement.

**RIP3 Processor** – Lets you add products to the RIP3 Queue for rapid product placement.

**Keystroke Manager** – Lets you assign any menu selection to a key.

**Layer Manager** – Create and store selections as layers

## Sales Menu

### Category Management

**Configure Category Mgmt** - Create category mgmt reports.

**Run Category Mgmt Report** - Run category mgmt reports.

**View Category List** – Display category list to use for showing category

**Chart** – Shows the Category report graphically.

**Identify Products By** – Show categories (or other fields) in different colors for easy identification. Display fields are:

Category

Sub Category

Sub Sub Category

Brand

Category Role

Strategic Role

Lifecycle Stage

### Visual Sales Reporting

**Configure Visual Sales Reports** – Create and change Visual Sales Report.

**Run Visual Sales Reports** – Run Visual Sales Report.

**Stop Visual Sales Reports** – Stop a running Visual Sales Report.

**Importing Sales Data** – Imports sales information from CSV style files.

**Setup Sales Periods** – Define each sales period to be used with sales data..



## Report Menu

**Print Planogram** – Set print options and print the planogram.

**Print Shelving Schematic** – Set print options schematic printout.

**Set Section Headers & Footers** – Set headers and footers for planogram printouts.

**Schematic Listing** – Print or display information for constructing the actual shelving.

**Product Listing** – Print of display list of items on the display, quantities and placement.

**Space Analysis Report** – Analyzes display space usage.

**Financial Analysis Report** – Analyzes display profitability.

**Product File Listing** – Detailed information about the Items database file.

**Presentation Manager**

**Create/Change Presentation Report** – Create and change Presentation Reports.

**Run Presentation Report** – Runs Presentation Reports.

**Report Writer** – Create, change and run custom reports.

## Help Menu

**Contents** – Opens the Help system.

**About** – Shelf Logic® version and release information.

# Creating the Database

Shelf Logic® Enterprise Edition requires a minimal amount of initial setup, however, as with any new software, setup should be given careful consideration. Instructions for creating a database must be carefully followed. Data entry and product dimensions must be accurate. *The quality of your final planogram is dependent upon an accurate, well-planned database.*

There are 3 ways to get product information into the database.

1. Manually enter the data using the Product Information Screen.
2. Import the data from an Excel spreadsheet using the Shelf Logic Import feature See Section 16. “Exporting and Importing”.
3. Put the data directly into the Access 2000 database. This is done outside of Shelf Logic and is for users who have a familiarity of writing queries or programs in Access 2000

Which method you choose will depend upon the size of your database, whether your database already exists in another application, and your experience level with database concepts. In this section, items will be entered into the database through Shelf Logic® Enterprise Edition. Importing a database is covered in Section 14.



**Note:** *Be sure that all plan files are closed and that only the main Shelf Logic® Enterprise Edition application window is open (gray background). Many of the Hot Buttons and Menus will be inactive, however, the items database can still be accessed. If you previously had the sample files open during this working session, close Shelf Logic® Enterprise Edition and reopen it to access the default items database.*

## Metric Planograms

Menu: File/Unit of Measurement/English

Menu: File/Unit of Measurement/metric

Shelf Logic supports both English and Metric systems. You can switch between the two of them, even while you are working on your plan. When in English, measurements are in inches, except for the display size, which is measured in feet. When in metric, all measurements are in centimeters (cm).

To switch between English and metric, use the “File/Unit of Measurement” menu selection and choose English or metric.

# Entering Items into the Database

## Product Information Form

Hot Button: Items  
Items Menu: Maintenance  
Keyboard Shortcut: <Ctrl + I>

When you execute one of the above commands, the Product Information form will open as shown below. The name and location of the active database file will appear on the title bar of the form—double check that you are using the correct database.

The screenshot shows the 'Product Information' window with the title bar indicating the database file path: 'C:\Program Files\Shelf Logic Enterprise Edition\Samples\Dairy.MDB'. The 'General' tab is selected, displaying various input fields. At the top, there are fields for 'UPC Code' (3450014000) and 'Item Name' (LOL Margarine Sticks). Below these are tabs for 'General', 'Dimensions', 'Images', 'Sales', and 'Pricing'. The 'General' tab contains fields for 'UPC Code', 'SKU Code' (LOL1400), 'Item Code' (14000), 'Vendor Code' (2996), 'Vendor Name' (Land O Lakes), 'Item Name' (LOL Margarine Sticks), 'Desc' (Land O Lakes Margarine Sticks 1lb), 'Category' (Dairy), 'Sub Category' (Butter), 'Sub Sub Category', 'Brand' (Land O Lakes), 'Category Role', 'Strategic Role', and 'Lifecycle Stage'. On the right side of the form, there is a '1 of 1' indicator, 'Back' and 'Fwd' navigation buttons, and a vertical stack of buttons: 'Save', 'Cancel', 'Delete', 'Exit', 'Item Color', and 'User Fields'.

**Figure 2 Product Information**

The Product Information Window is divided into 5 screens. The first tab displays the “General” screen as shown in the figure above. This has the identification information such as UPC and SKU codes, Vendor information, etc.

Each line in the screen is called a field:

- use <Tab> to move forward one field,
- use <Shift +Tab> to move backward one field,
- or click the mouse inside the field to select it.

The UPC Code is the key field of the database and should always be entered first. If an item has already been entered using this UPC Code, the item details will fill the Product Information Window. The UPC Code must be unique for each item—duplicates are not allowed.

Product Information - C:\Program Files\Shelf Logic Enterprise Edition\Samples\Dairy.MDB

UPC Code: 3450014000 Item Name: LOL Margarine Sticks

General Dimensions Images Sales Pricing

Product Type: ☒ Shelf ☐ Peg ☐ Sign

Unit of Measurement: ☒ English (in) ☐ Metric (cm)

Merchandising Style: Unit

	Width	Height	Depth	Pack	Eff Date	Avg Cost	Avg Sell Price	Avg Retail
Unit	4.8700	4.8700	1.4000	1		\$0.78	\$1.08	\$1.89
Tray	19.4800	4.8700	5.6000	16		\$0.00	\$0.00	\$0.00
Case	19.4800	9.7400	8.4000	48		\$0.00	\$0.00	\$0.00
Display	14.6100	4.8700	1.4000	3		\$0.00	\$0.00	\$0.00
Alternate	12.5000	4.8700	2.8000	6		\$0.00	\$0.00	\$0.00

Peghole from Left: 0.0000 Peghole from Top: 0.0000

Nest Amount: 0.0000 Weight: 4.0000

1 of 1

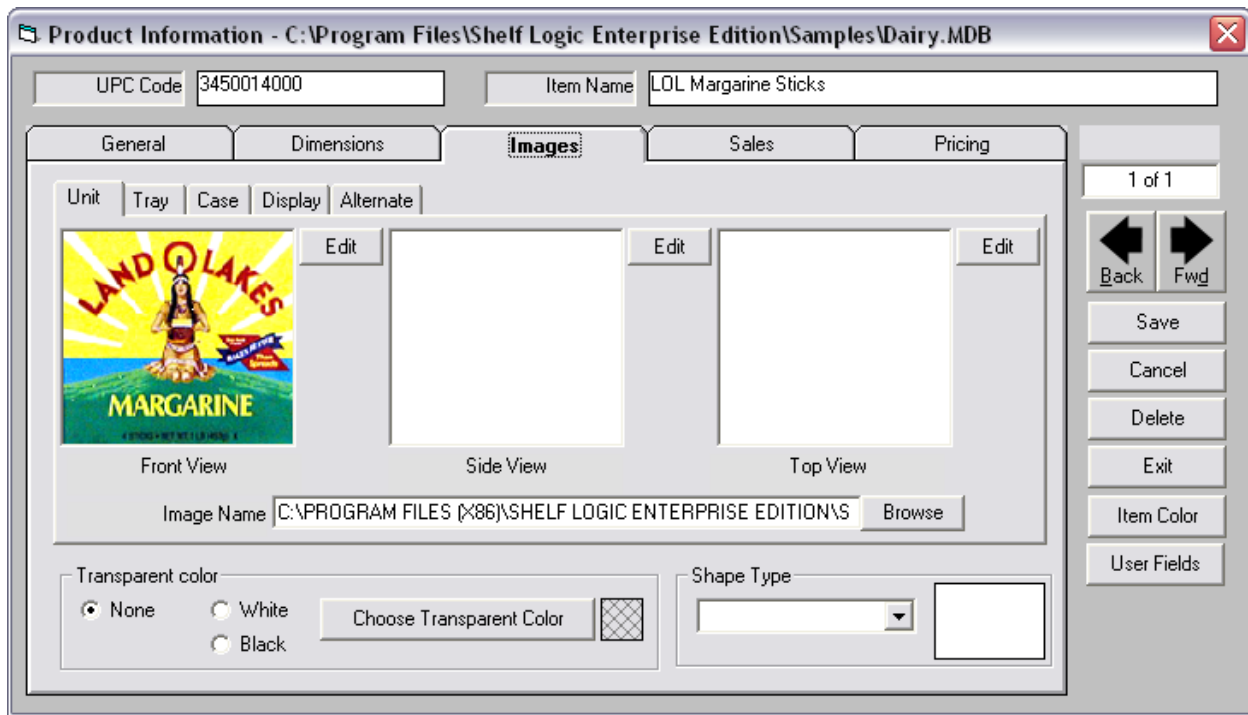
Back Fwd

Save Cancel Delete Exit Item Color User Fields

The second tab is the “Dimensions” screen and has all of the dimensional information about the product. There are 5 product merchandising types, Unit, Tray, Case, Display and Alternate. You can use these to represent other product packing, such as carton, etc. But essentially, you have 5 ways a product can be placed onto the plan.

And for each display type, there are dimensions and pricing and separate images for each type. The “Merchandising Style” combo box will determine which of these display types are used for this product on the plan.

The pricing information entered is used for profit analysis, etc. You can enter much more specific pricing information for the product elsewhere, but these figures are used as a general or average pricing for this product.



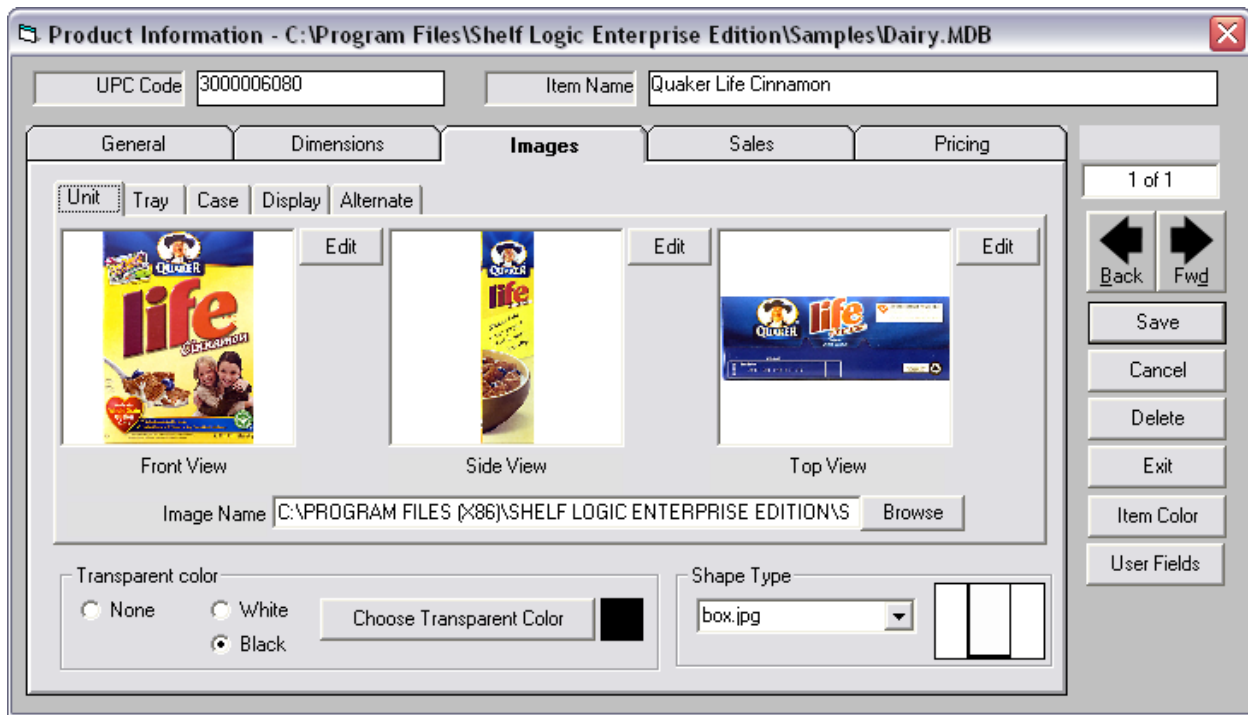
The third tab is the “Images” screen, which is displayed in the figure above. This shows the product images used for the product. You can have photos for each of the 4 display types. And for each display type, you can have front, side and top view photo images.

Above the photos are tabs for each Display Type, Unit, Trap, Case and Display.

Next to each photo is a small button marked “Edit”. This will place the product photo into our Image Workbench where you can adjust contrast and brightness and much more. See the “Image Workbench” section for more information.

Below the product images is the path and name of the photo image. You always enter the name of the Front View photo. Shelf Logic supports 21 image types. If you will also have a side and top view photos, then the Front View photo has to have an extension of “.1” (one).

When Shelf Logic sees the “.1” extension, it will also look for photos ending in “.2” (side view) and “.3” (top view). If these photos are found, they are displayed, as shown in the figure below.

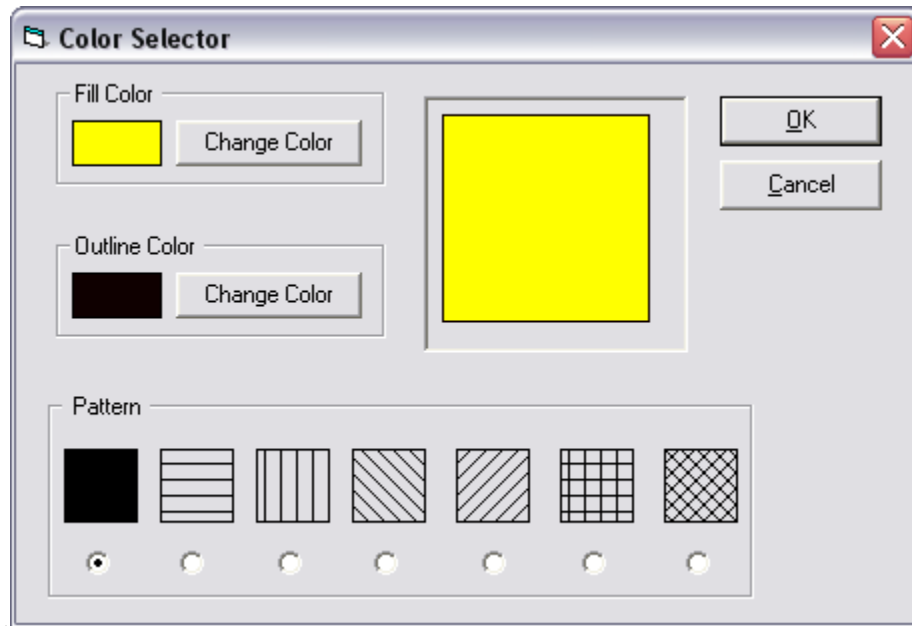


Here the image name ends in “.1” so the program shows the side and top views. The top view looks larger only because the photo is displayed as large as the space allows. On the plan, of course, each view is the same size.

The “Transparent Color” lets you select a transparent background color. This is useful for non-rectangular product and for nesting products. This transparent color is used for all Display Types and views for this product.

## Item Color

You can select the fill and outline color for each product by clicking on the “Item Color” button. The following window will be seen.



Click on the “Change Color” buttons to change the Fill and Outline Colors. The Window Color Selector will appear and you can choose from over 16 million colors. You can also select a pattern for the product.

# Product Information Chart

Some fields are required entries and some fields require data in a specific format. Each field has a maximum allowable number of characters. If a field is user-defined, that means numbers or letters are acceptable. Refer to the Product Information chart below.

While your database is still in the planning stage, we suggest creating a practice planogram and printing out a sample of each report so you can see the effects of any empty or user-defined fields.

The following chart details the type of data to be entered when creating your database in Shelf Logic® Enterprise Edition:

## Product Information Field Chart

Field Name (*Can Edit Field Label)	Data Type	REQUI RED	Max Chars	Description
*UPC Code	Text	Yes	25	The industry standard Universal Product Code. This field is the primary (key) field, which Shelf Logic® Enterprise Edition uses to organize and locate items. It must be a unique number for each item—no duplicates are allowed.
*Item Code	Text	No	25	Although this is an optional field, leaving it empty may have significant impact on your final results.
*SKU Code	Text	No	25	The manufacturer's identification code for the particular item.
*Vendor Code	Text	No	25	Code or number to identify the vendor that supplies this item.
*Vendor Name	Text	No	50	The full name of the vendor that supplies this item.
*Item Name	Text	No	50	Although this is an optional field, leaving it empty may have significant impact on your final results.
Item Type	Text	Yes	1	“P” for peg items, “S” for shelf items, “I” for sign items.
*Category	Text	No	50	This field can be used to organize items by groups of related products for database filtering. Some reports are sorted by category.
Sub Category	Text	No	50	Second level category
Sub Sub Category	Text	No	50	Third level category
Category Role	Text	No	25	
Strategic Role	Text	No	25	
Lifecycle Stage	Text	No	25	
*Description	Text	No	50	A detailed description of the item.
Unit Width	Number	Yes	12	The width of the item (left to right) in inches. Enter whole numbers or decimals



				(1, 1.25, 1.5). Do not enter fractions.
Unit Height	Number	Yes	12	The height of the item (top to bottom) in inches. Enter whole numbers or decimals (1, 1.25, 1.5). Do not enter fractions.
Unit Depth	Number	Yes	12	The depth of the item (front to back) in inches. Enter whole numbers or decimals (1, 1.25, 1.5). Do not enter fractions.
Unit Units	Number	Yes	12	The number of individual products in a “Unit”
Unit Cost	Currency	No	12	Enter the wholesale price of the Unit item. This field is used to calculate profit margins. Do not enter dollar signs.
Unit Sell Price	Currency	No	12	Enter the price that the Unit item is sold for in dollars. This is usually the wholesale price of the item. Do not enter dollar signs.
Unit Retail Price	Currency	No	12	Enter the suggested retail price of the Unit item in dollars. This field is used to calculate profit margins. Do not enter dollar signs.
Tray Width	Number	Yes	12	The width of the Tray item (left to right) in inches. Enter whole numbers or decimals (1, 1.25, 1.5). Do not enter fractions.
Tray Height	Number	Yes	12	The height of the Tray item (top to bottom) in inches. Enter whole numbers or decimals (1, 1.25, 1.5). Do not enter fractions.
Tray Depth	Number	Yes	12	The depth of the Tray item (front to back) in inches. Enter whole numbers or decimals (1, 1.25, 1.5). Do not enter fractions.
Tray Units	Number	Yes	12	The number of individual products in a “Tray”
Tray Cost	Currency	No	12	Enter the wholesale price of the Tray item. This field is used to calculate profit margins. Do not enter dollar signs.
Tray Sell Price	Currency	No	12	Enter the price that the Tray item is sold for in dollars. This is usually the wholesale price of the item. Do not enter dollar signs.
Tray Retail Price	Currency	No	12	Enter the suggested retail price of the Tray item in dollars. This field is used to calculate profit margins. Do not enter dollar signs.
Case Width	Number	Yes	12	The width of the Case item (left to right) in inches. Enter whole numbers or decimals (1, 1.25, 1.5). Do not enter fractions.
Case Height	Number	Yes	12	The height of the Case item (top to bottom) in inches. Enter whole numbers or decimals (1, 1.25, 1.5). Do not enter fractions.
Case Depth	Number	Yes	12	The depth of the Case item (front to back)

				in inches. Enter whole numbers or decimals (1, 1.25, 1.5). Do not enter fractions.
Case Units	Number	Yes	12	The number of individual products in a “Case”
Case Cost	Currency	No	12	Enter the wholesale price of the Case item. This field is used to calculate profit margins. Do not enter dollar signs.
Case Sell Price	Currency	No	12	Enter the price that the Case item is sold for in dollars. This is usually the wholesale price of the item. Do not enter dollar signs.
Case Retail Price	Currency	No	12	Enter the suggested retail price of the Tray item in dollars. This field is used to calculate profit margins. Do not enter dollar signs.
Display Width	Number	Yes	12	The width of the Display item (left to right) in inches. Enter whole numbers or decimals (1, 1.25, 1.5). Do not enter fractions.
Display Height	Number	Yes	12	The height of the Display item (top to bottom) in inches. Enter whole numbers or decimals (1, 1.25, 1.5). Do not enter fractions.
Display Depth	Number	Yes	12	The depth of the Display item (front to back) in inches. Enter whole numbers or decimals (1, 1.25, 1.5). Do not enter fractions.
Display Units	Number	Yes	12	The number of individual products in a “Display”
Display Cost	Currency	No	12	Enter the wholesale price of the Display item. This field is used to calculate profit margins. Do not enter dollar signs.
Display Sell Price	Currency	No	12	Enter the price that the Display item is sold for in dollars. This is usually the wholesale price of the item. Do not enter dollar signs.
Display Retail Price	Currency	No	12	Enter the suggested retail price of the Display item in dollars. This field is used to calculate profit margins. Do not enter dollar signs.
Alternate Width	Number	Yes	12	The width of the Alternate item (left to right) in inches. Enter whole numbers or decimals (1, 1.25, 1.5). Do not enter fractions.
Alternate Height	Number	Yes	12	The height of the Alternate item (top to bottom) in inches. Enter whole numbers or decimals (1, 1.25, 1.5). Do not enter fractions.
Alternate Depth	Number	Yes	12	The depth of the Alternate item (front to back) in inches. Enter whole numbers or decimals (1, 1.25, 1.5). Do not enter

				fractions.
Alternate Units	Number	Yes	12	The number of individual products in a “Alternate”
Alternate Cost	Currency	No	12	Enter the wholesale price of the Alternate item. This field is used to calculate profit margins. Do not enter dollar signs.
Display Sell Price Alternate	Currency	No	12	Enter the price that the Alternate item is sold for in dollars. This is usually the wholesale price of the item. Do not enter dollar signs.
Alternate Retail Price	Currency	No	12	Enter the suggested retail price of the Alternate item in dollars. This field is used to calculate profit margins. Do not enter dollar signs.
Merch Style	Number	Yes	1	Default Merchandising style. 0=Units, 1=Tray, 2=Case. 3=Display 4=Alternate
Brand	Text	No	50	The product’s brand name
Weight	Number	No	12	The weight of a single item in ounces.
Weight UM	Text	No	2	The unit of measure for the weight. (oz, lb, gram, etc).
Peg Type	Text	No	2	The peg hook type for this item
Peghole1 Left	Number	Yes (for peg items)	10	This field is only available when the Peg Item Type is selected. Enter the distance from the left edge of the package to the center of the peg hole. Enter whole numbers or decimals (i.e. 0.25, 0.5, 0.75, 1). Do not enter fractions.
Peghole1 Top	Number	Yes (for peg items)	10	This field is only available when the Peg Item Type is selected. Enter the distance from the top edge of the package to the center of the peg hole. Enter whole numbers or decimals (i.e. 0.25, 0.5, 0.75, 1). Do not enter fractions.

<b>Field Name (*Can Edit Field Label)</b>	<b>Data Type</b>	<b>REQUIR ED</b>	<b>Max Chars</b>	<b>Description</b>
Last Sales ID	Number	No	8	No entry is made by the user. This field is controlled by Shelf Logic
Last Changed	Text	No	8	No entry is made by the user. This field is controlled by Shelf Logic and will automatically display the date of the last change to this item.
Outline Color	Number	Yes	10	The Face outline color
Fill Color	Number	Yes	10	The Face outline color
Pattern	Number	Yes	1	The Pattern Number of the Face
Image Name	Text	No	100	Enter the path (location) and filename of the image file to be associated with this item. Clicking the browse button will allow you to select the file from the contents of your computer.
Tray Image Name	Text	No	100	Enter the path (location) and filename of the image file to be associated with the Tray item.
Case Image Name	Text	No	100	Enter the path (location) and filename of the image file to be associated with the Case item.
Display Image Name	Text	No	100	Enter the path (location) and filename of the image file to be associated with the Display item.
Alternate Image Name	Text	No	100	Enter the path (location) and filename of the image file to be associated with the Alternate item.
Shape Number	Number			
Shape Name	Text		100	
Transparent Color	Number	No	12	Check desired transparent background color or click on the button to enter your own color.
Nest Amount	Number	No	12	The height in inches of the portion that shows when this item is stacked one inside the other.
*User 1	Text	No	50	Optional, user defined field.
*User 2	Text	No	50	Optional, user defined field.
*User 3	Text	No	50	Optional, user defined field.
*User 4	Text	No	50	Optional, user defined field.
*User 5	Text	No	50	Optional, user defined field.
Metric	Yes/No	Yes	1	Yes if this item is measured in Metric units
Brand	Text	No	50	

**Record Counter** – Located at the upper right corner of the Product Information form, the first number indicates the current record number and the second number indicates the total number of records in the database.

**Forward & Back Buttons** – Used to scroll through the contents of the Items Database. This is an alternative to searching when you have a small database, and an alternative to the “Save” button to edit a record and continue scrolling.

**Save Button** - Once the required data has been entered, click the Save button (or use the keyboard shortcut of <Alt + S>). After clicking the Save Button, the Product Information form will clear so that another item can be entered.

**Cancel Button**– Clears the screen without saving changes.

**Delete** – Deletes the current record from the Items Database.

**Exit** – Closes the Product Information screen and returns to the main Shelf Logic®Enterprise Edition screen.

**Item Colors** - Click the Item Color Button to select a color scheme and pattern that will print in line art printouts and display on screen when photo images are turned off. Each item can have its own outline color, fill color, and pattern. If no color scheme is selected, a default of white with black outline will be used.

**User Fields** – This lets you enter the user fields window to enter one or more additional user fields..

# Item Types

There are three types of items used by Shelf Logic, shelf items, peg items, and signage.

## Shelf Items

Shelf Items have an item type of “S”, can be placed only in shelves. You will get an error message if you try to put a shelf item in a peg area.

## Peg Items

A peg item, with an item type of “P”, is placed in a peg area, but can also be placed onto shelves. Many peg items can also stand up and can therefore be placed on a shelf. Peg items must have the Peghole from Left and Peghole from Top measurements

## Signage Items

A signage item, with an item type of “I”, is used to represent signs and fixtures. Signage items can be placed anywhere on the display. They have width and height, but no depth, weight, nesting amount, suggested retail, peg hole from top and left. You can assign a photo image to a sign and put the sign anywhere on your display. The sign is on the plan but not included in the Space Analysis or Financial Analysis reports.

Creating a sign is similar to adding an item to the database. The difference is that the item type is “I” for a sign item. Create a UPC Code, or make one up, for the item and enter it. Then enter the other information you need. You will need to enter the signs height and width, and you should specify the photo of this sign. Otherwise the sign will appear as a colored box.

Sign will appear in the item list box with an item type of “I” and will come before the peg and shelf items in the Product List Selector list box. Select the sign item as you would any other item. Then place the sign in exactly the location you wish. You can drag the sign as you would any item. A sign can be deleted by selecting it and pressing the Delete Key, the same as deleting an item.

## Fixture Signs

You can create signs that simulate fixtures. For example, you could create a sign in the shape of a barrel and give it a barrel photo. This barrel can then be put onto the place and items can be put behind the barrel, making it seem like the barrel is a display for holding items.

## Important Note:

Do not move or rename a database once it's been used for a planogram.  
Do not delete products from a database if they have used in any planogram.

# Putting Photos into your Plan

In order to use photographic images in your planograms, all you have to do is enter the item's image file name and location in the Items database. Once entered, you should not move or rename image files and folders or you may have to recreate these links. Image files can be stored on any drive and in any folder, however, we recommend storing them in the Images subfolder created during installation of Shelf Logic Enterprise Edition.

## Image File Formats

Shelf Logic Enterprise Edition supports the following image file formats:

.BMP	Bitmaps
.CGM	Computer Graphics Metafile
.JPG, .JPEG	Jpegs
.FAX	Generic Fax
.FPX	Kodak FlashPix
.GIF	Graphics Interchange Format
.IMG	Gem Image
.MAC	Mac Paint
.MSP	Microsoft Paint
.PCD	Kodak Photo CD
.PCT	MacPict File
.PCX	PC Paintbrush
.PNG	Portable Network Graphics
.PSD	Photoshop File
.RAS	Sun Raster File
.SCT	Scitex Continuous Tone
.TGA	Targa
.TIF	Tagged Image Format File
.WMF	Windows Metafile Format
.WPG	WordPerfect Graphics Format

Transparency is supported for all image formats with your choice of any transparent color. In addition, each item can have its own transparent color.

Note: Some compressed image formats, like jpegs, don't make good candidates for having a transparent background. This is because the transparent color in the image may get changed slightly when compressed and will no longer match the specified transparent color you defined for that item.

If you are going to use photographic images with your plans, you can use the Shelf Logic Image Workbench to perform the following functions:

- Convert files between various formats.
- Resize or resample color images – Shelf Logic® Enterprise Edition will automatically scale the bitmap image to the proper size for the planogram, however, if the image is too large or too small, print quality may be affected. The recommended size is approximately 100 to 400 pixels height or width, with the second dimension proportionate to the first.

- Cropping – the photograph should be taken straight on and never at an angle. Crop as close as possible to the edges of the actual item, removing as much excess background as possible.
- Change background color – since the printed planogram background is white, the graphic image background should also be white. If you want transparency, then color the background a unique color not found anywhere else in the image. Use a graphics program such as Photoshop to do this.

## Transparency

Shelf Logic supports transparent images for all image types. Each item can have its own transparent color. This is done by specifying a transparent color on the Product Information screen. You can select “none” for no transparency, “Black” to make black the transparent color, “white” to make white the transparent color, or click on the “Choose Transparent Color” button to select a different transparent color.

*Note:* Transparency doesn’t work well with compressed image types such as a jpeg. This is because the transparent color may change when the image is compressed and no longer match the color you selected.

## Three-Sided Image Support

Shelf Logic® Enterprise Edition supports industry standard 3-sided images. These images have a file extension of .1 .2 or .3. Only the image named .1 is entered into the image file field but all three images must be in the same folder. When the Flip Item feature is used, Shelf Logic® Enterprise Edition will automatically use the item image with the corresponding side number. When an item is flipped to side 2, imagefile.2 will be used; and when flipped to side 3, imagefile.3 will be used.



**Figure 3. Front View**



**Figure 4. Side View**



**Figure 5. Top View**



# The Image WorkShop

You can edit your photo images directly from the Shelf Logic Item Maintenance window. You can automatically crop, change brightness and contrast, sharpen your image and much more. Next to the picture displayed on the Item Maintenance window, there's a button labeled "Edit Photo". When this is clicked, the Image WorkShop Window will appear, as shown below.



The large square area is the *Image Window* and we can see our image displayed there. On the left are buttons to modify and adjust the image. On the right are controls to zoom in and out on the image.

Below the image are the image dimensions (width x height) and the name of the image. If the item is cropped or resized, you will see the new dimensions here.

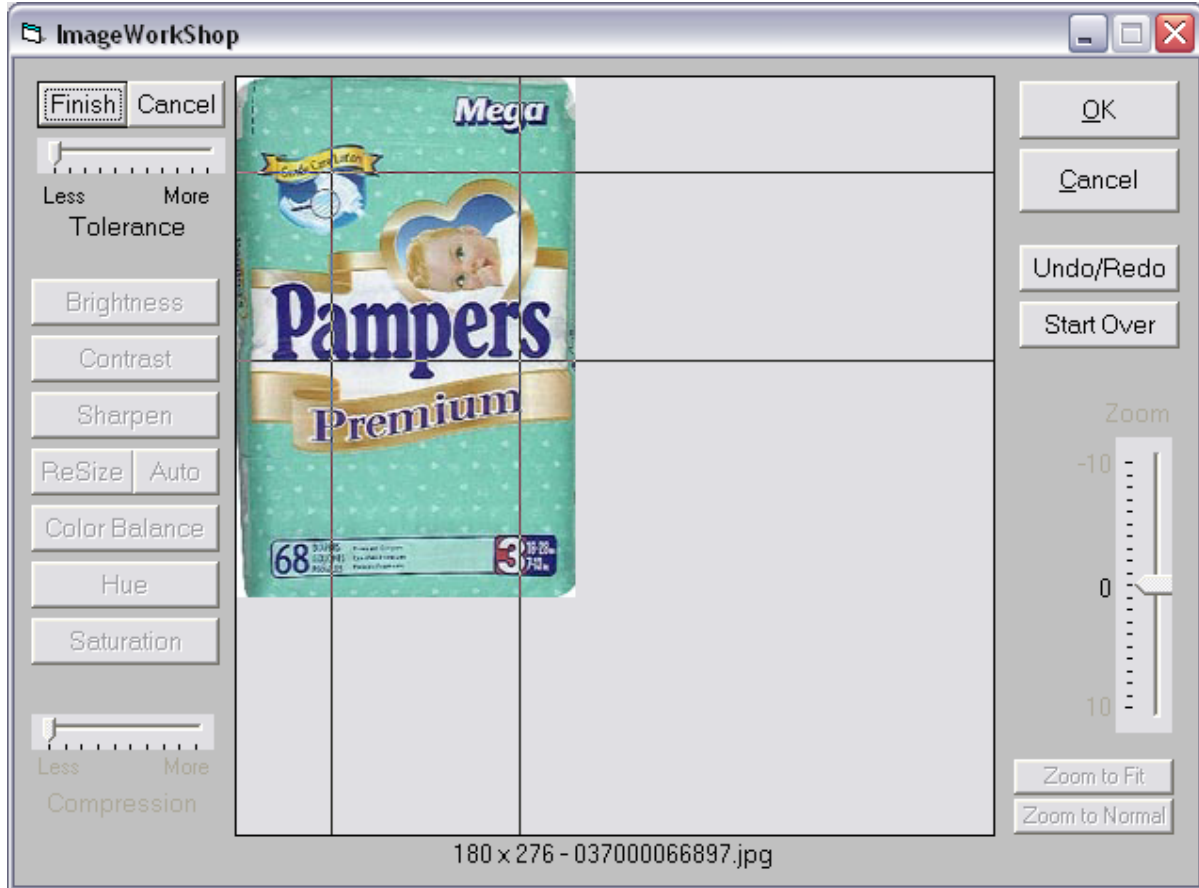
## Cropping



There are two ways to crop an image, the "Crop" and "Auto Crop".

## Crop

When you click the “Crop” button, four *Crop Lines* will appear, two vertical and two horizontal.



You can drag these Crop Lines into the proper position using the mouse. Click the left mouse button when the mouse is over a line and you can position it over the image in the desired location.

When you click the “Crop” button, the button’s caption then changes to “Finish” and the “Auto” button changes to “Cancel”, as shown below:



When the Crop Lines are positioned correctly, click the “Finish” button to complete the cropping. If you decide not to crop the image, click on the “Cancel” button.

## Auto Crop

The Auto Crop is useful when there is a white (or any color) area around an item. The Auto Crop will automatically find the borders of the product image and position the Crop Lines at these borders.

You can then move the Crop Lines if needed. When done, you can click on the “Finish” button or click on “Cancel” to cancel the auto crop.

## Tolerance

The *Tolerance* Slider sets how the border color differences are treated. If the Tolerance is set at Less, then the border has to be a pure color. If the color is not pure, then you need to increase the Tolerance until the Auto Crop can go past the border area and sense the product border edge.

If the Tolerance isn't set properly, you can cancel the operation and increase the tolerance and do the auto crop again.

***Suggestion:*** Start with the least amount of Tolerance, and try the Auto Crop. If the lines aren't to the edges of the product, then press “Cancel” and try it again with a larger tolerance until the lines touch the edge of the product. Try this same tolerance with your other images.

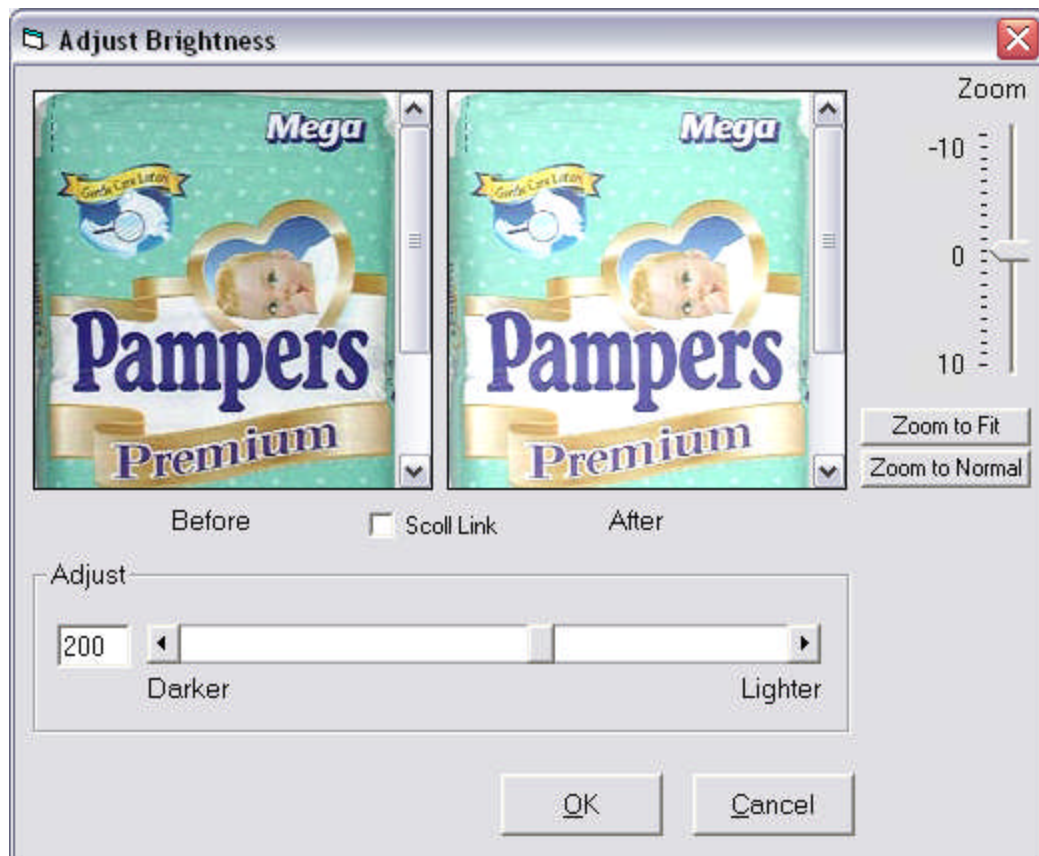
# Brightness

The Brightness button lets you control the amount of brightness for the image. When this button is clicked, the *Adjust Brightness Window* is displayed, as shown below:



The picture on the left is the current image. It remains the same while the image on the right is changed as the brightness level is changed.

To change the brightness, use the scroll bar to scroll to make the image darker or lighter. As you move the scroll bar, you will see the effects in the right picture, as we see below:



The scroll bar is move towards lighter in the amount of 200 and the image on the right shows the results. If we click the OK button now, the image will be this bright.

You can also enter a value in the textbox that's in front of the scroll bar. You can specify a value between -1000 (darker) and 1000 (lighter). If we enter 125 into the textbox, the image will change to that value, as we see below:



If the image is too large to fit in the image box, scroll bars will appear so you can scroll the image.

### **Zoom**

The Zoom slider on the right side is used to zoom in and out on the image. Sliding it up will zoom out and make the image smaller. Sliding down increases the magnification.

### **Zoom to Fit**

Clicking on the *Zoom to Fit* button will enlarge or reduce the image so it fits within the borders of the image box.

### **Zoom to Normal**

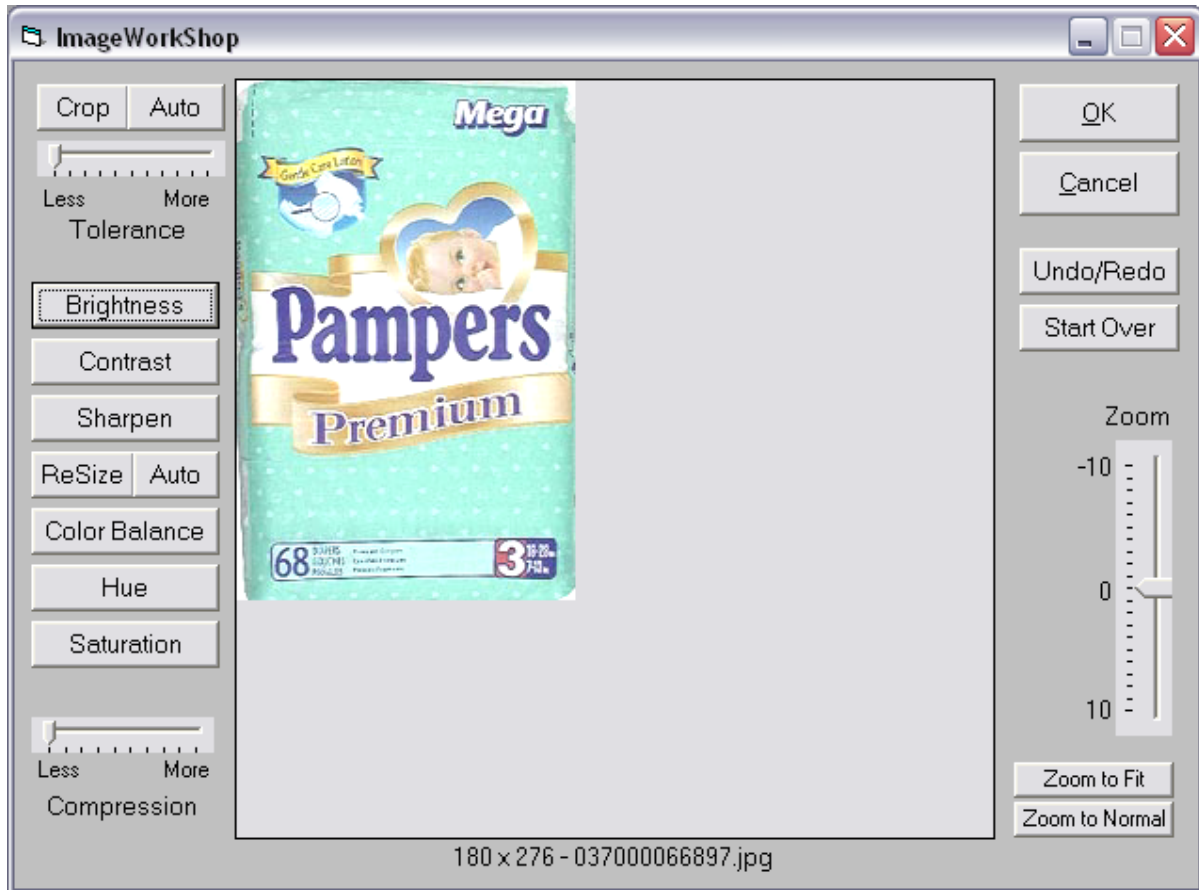
Clicking on the *Zoom to Normal* button will display the image in its normal state, with no magnification.

## Scroll Link

The *Scroll Link* checkbox will synchronize the two image boxes so they scroll together. This makes comparing the before and after image easier and makes it easier to zoom in and look at details.

When the Scroll Link checkbox is checked and you scroll either image, the other image scrolls as well. When unchecked, each image scrolls separately.

When you click the OK button, you will return to the Image WorkShop Window, where the altered image will be displayed, as we see below.



We can see that the image is now much lighter. If this doesn't look right, you can 'undo' it. Click on the "Undo/Redo" button. With the first click, the image will return to the way it looked before the Brightness adjustment. With the second click, the image will again display the image after the Brightness adjustment. With each click, you go back and forth between the two 'versions' of the image. This is very useful to see which image, before or after, looks better.



## Contrast

The *Contrast* button lets you control the amount of contrast for the image. When this button is clicked, the *Adjust Contrast Window* is displayed, as shown below:



This is identical to the *Adjust Brightness Window*, except that the scroll bar controls the amount of contrast instead of brightness.

As with the Brightness, you can move the scroll bar or enter a value between -1000 and 1000.



# Hue

The *Hue* button lets you control the hue of the image. When this button is clicked, the *Adjust Hue Window* is displayed, as shown below:



This is identical to the *Adjust Brightness Window*, except that the scroll bar controls the hue instead of brightness.

As with the Brightness, you can move the scroll bar or enter a value between  $-180$  and  $180$ .

## Saturation

The *Saturation* button lets you control the amount of saturation for the image. When this button is clicked, the *Adjust Saturation Window* is displayed, as shown below:



This is identical to the *Adjust Brightness Window*, except that the scroll bar controls the saturation instead of brightness.

As with the Brightness, you can move the scroll bar or enter a value between  $-1000$  and  $1000$ .

# Sharpen

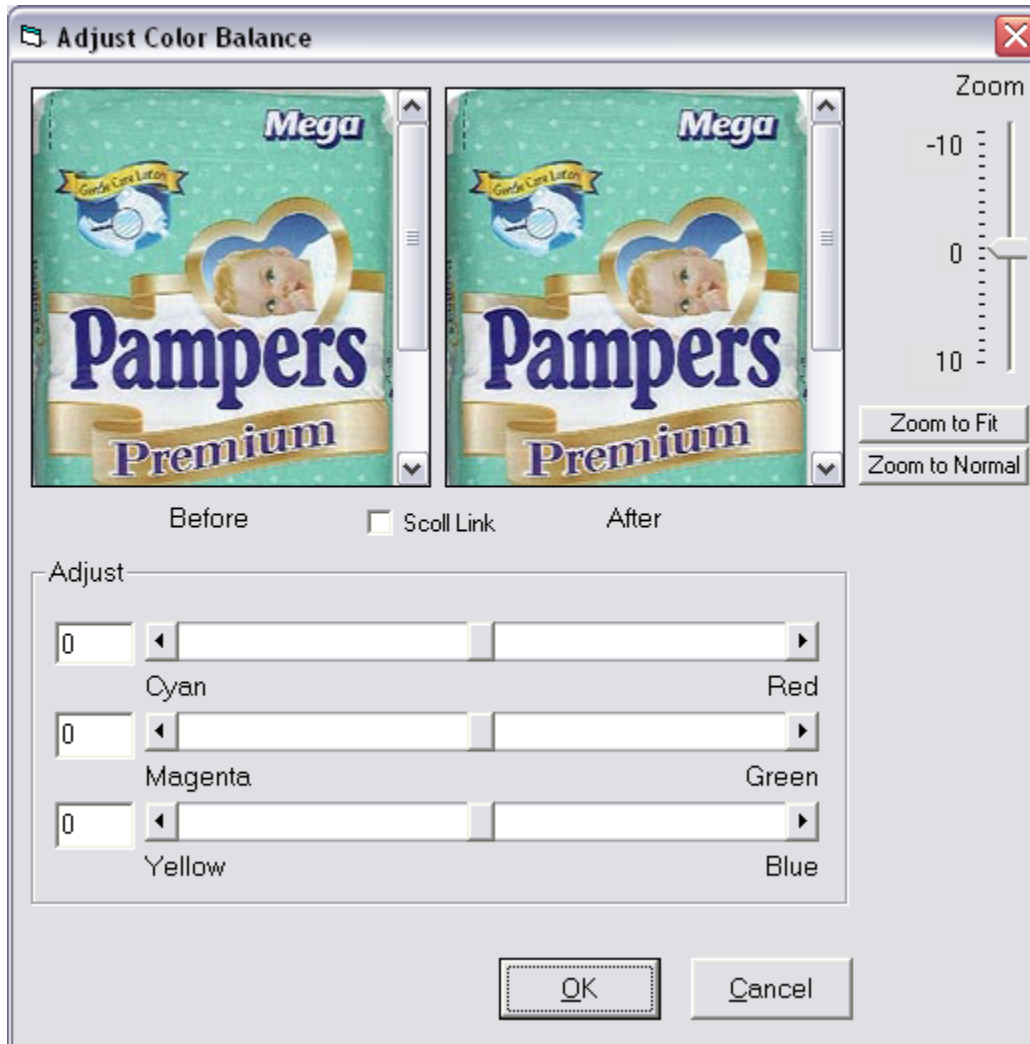
This is identical to the *Adjust Brightness Window*, except that there are three scroll bars to control the sharpness of the image. The *Adjust Sharpness Window* is shown below:



The Amount scroll bar control the amount of sharpness and goes from 0 to 500. The Radius control the thickness of the edges being sharpened and goes from 0 to 1000. The Threshold controls the threshold at which the sharpening begins and goes from 0 to 255.

## Color Balance

This is identical to the *Adjust Brightness Window*, except that there are three scroll bars to control the color balance of the image. The *Adjust Color Balance Window* is shown below:



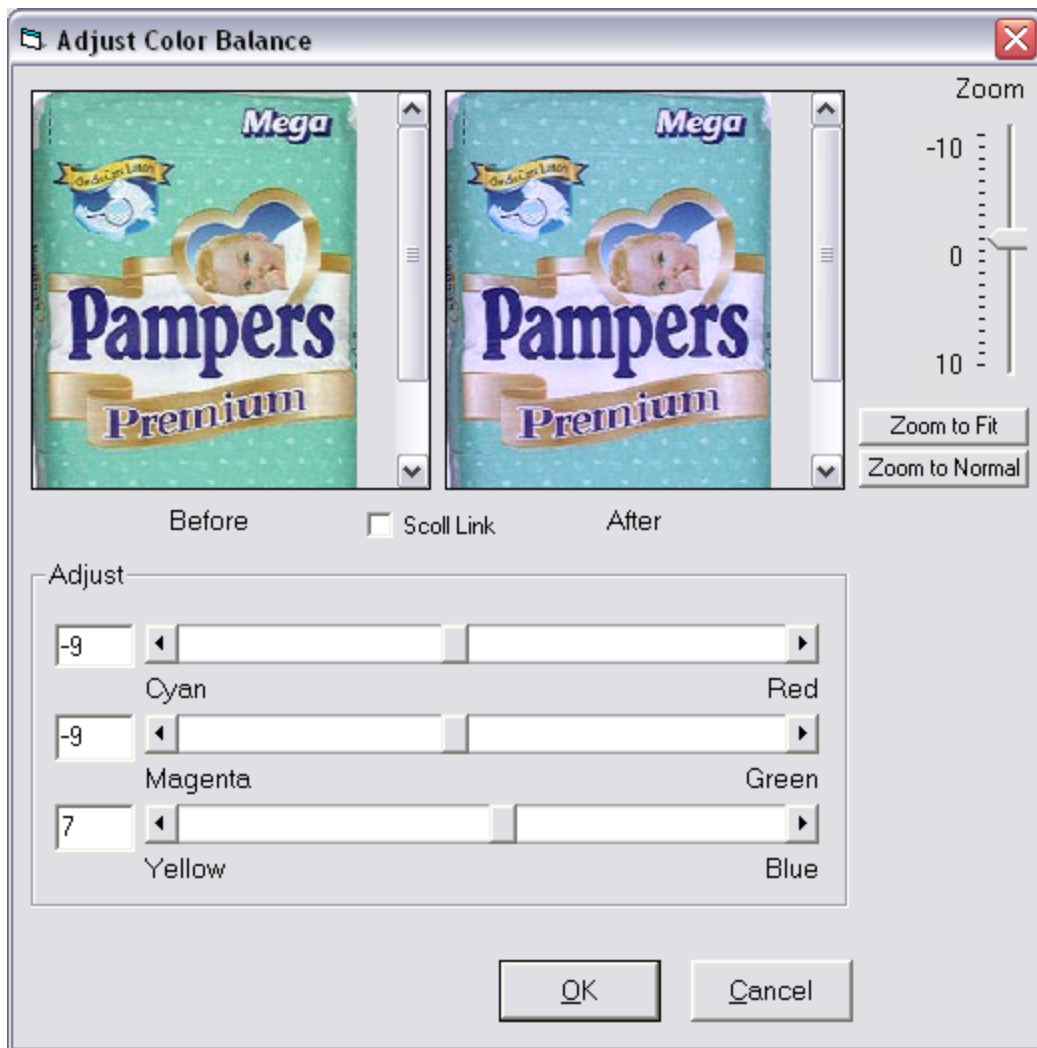
The three scroll bars control the balance of each group of RGB colors. The first controls the balance between red and its opposing color, cyan.

The second controls the balance between green and its opposing color, magenta.

The third controls the balance between blue and its opposing color, yellow.

Each scroll bar goes from -100 to 100.

In this next figure, we've adjusted the color to remove the excess greens from the white area of the package and increased the blue color.



In the image on the left, there's an overall greenish cast, especially in the white area around the "Pampers" letters. So first we remove the green color by sliding the scroll bar away from Green and towards Magenta. The negative 9 indicates 9 towards the magenta color.

There was also a bit of red color needing removal so the first scroll bar is put 9 towards Cyan and away from Red.

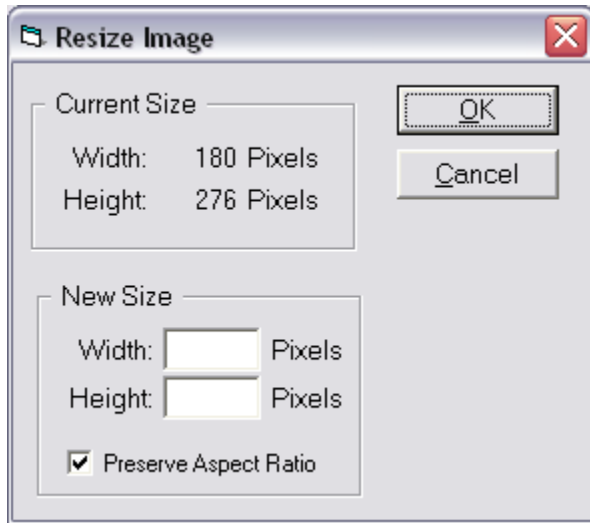
Finally we add some blue color to our image so the third scroll bar is moved towards Blue. The positive 7 indicates 7 towards the blue color.

# Resize

There are two ways to resize the image.

## Manual Resize

You can manually assign the new size, in pixels, of the image. When you click on this, the *Resize Window* appears, as shown below:



The current size is shown, then you can enter the new width and height.

## Preserve Aspect Ratio

If you want the resized image to not be stretched in one direction or the other, the width and height must be resized together in the right amounts. If you check the *Preserve Aspect Ratio* check box, you only need enter the new width and the new height is automatically calculated for you. Or you can enter the new height and the new width is automatically calculated for you.

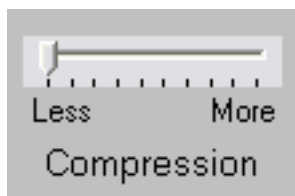
## Auto Resize

Clicking on the *Auto Resize* button will automatically resize the image to the recommended size of 400 pixels at the largest dimension. So if the image is taller than wide, the new height will be 400 pixels. If the image is wider than high, the width is changed to 400 pixels. In either case, the aspect ratio is preserved so the image isn't distorted.

The *Auto Resize* operation is done on the Image WorkShop window, you don't see the *Resize Window* for this.

## Compression

When you save your image as a jpg, you can compress it in size using the *Compression Slider*, as shown below.



At the “Less” setting, no compression takes place. At the “More” setting the most compression takes place. The Compression setting is only when saving JPG type images.

## Undo/Redo

The Undo/Redo button reverses the last image adjustment. If you click this button again, it does a ‘redo’ and shows you the adjusted image. You can toggle back and forth between the before and after versions of the image adjustment.

## Start Over

If you don't like the adjustments made to the image, you can click on the *Start Over* button. This will reload the image from disk and let you start the adjustment process over again.

## OK

Clicking the *OK* button saves your image to disk and returns you back to the program where you left off.

## Cancel

Clicking the *Cancel* button **does not** save your image and returns you back to the program where you left off.

# Maintaining the Items Database

## Editing the Product Information Form

Menu: Item/Maintenance  
Hot Button: Items

Executing one of the above commands will open an empty Product Information screen to enter a new item or edit an existing one. Locate the item you wish to edit using one of the following methods:

- Select the item on the planogram, right-click and select Edit Item.
- Double-click the item on the planogram.
- Locate the item in the Items Window, right-click and select Edit Item.
- Open Product Information and search the database for the item.

## Saving Changes to the Items Database

After making changes to an existing item click the Save button to save the changes and clear the Product Information form; or, click the right or left scroll button to save the new record and proceed to the next record. Once an existing item has been edited, Shelf Logic® Enterprise Edition will automatically insert the current date in the Last Change Date field.

*Editing the item's UPC code will create a duplicate item with a new UPC code. The original item will remain unchanged.*

## Deleting an Item From the Database

After locating the item in the database, click the Delete button. Deleting an item in this manner permanently erases the item from the database. Do not delete items that have used on a plan.



# Update From Database

Menu: Item/Update from database

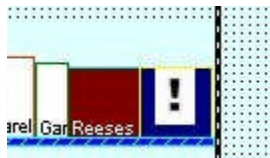
When a plan file is opened, Shelf Logic<sup>®</sup> Enterprise Edition automatically checks the database for possible changes in three areas:

1. Does the item on the plan still exist in the current database?
  - If the item has been deleted, a warning dialogue box will open listing the deleted UPC codes and deleted items on the plan will be marked with a large black X as shown below. This item cannot be updated and should be removed from the plan.



**Figure 6. Deleted UPC Code**

2. Are the length, width and depth of the items on the plan the same as in the current database?
  - If not, the item is marked with a large black exclamation point as shown below.
3. Are the peg hole locations (left and top) the same as in the current database?
  - If not, the item is marked with a large black exclamation point as shown below.



**Figure 7. Changed Item Dimensions**

The Update from Database command can be executed by selecting the above menu command, or by right-clicking the item on the plan. The selected item will be updated to reflect the new information in the database. The item's position may then need to be adjusted manually.

# Customizing Your Database

The following database features can be customized, making the Shelf Logic® Enterprise Edition database extremely flexible:

- Set the default database to a Shelf Logic® database in any folder on any drive.
- Change any optional field label so that any data can be entered and labeled correctly.
- Three user-defined fields that can be used for any additional data you wish to include in the database.

## The Default Items Database

View Menu:                      Preferences

The default database is the database used as the default when you start a new plan. The default is preset to C:\Program Files\Shelf Logic Enterprise Edition\datafile\item.mdb, but you can create more database files and make any one of them the default. This feature is particularly useful if you wish to store your database file on a shared network drive.



***Note: You must close and restart Shelf Logic® for the new default database to take effect.***

# Working With Multiple Databases

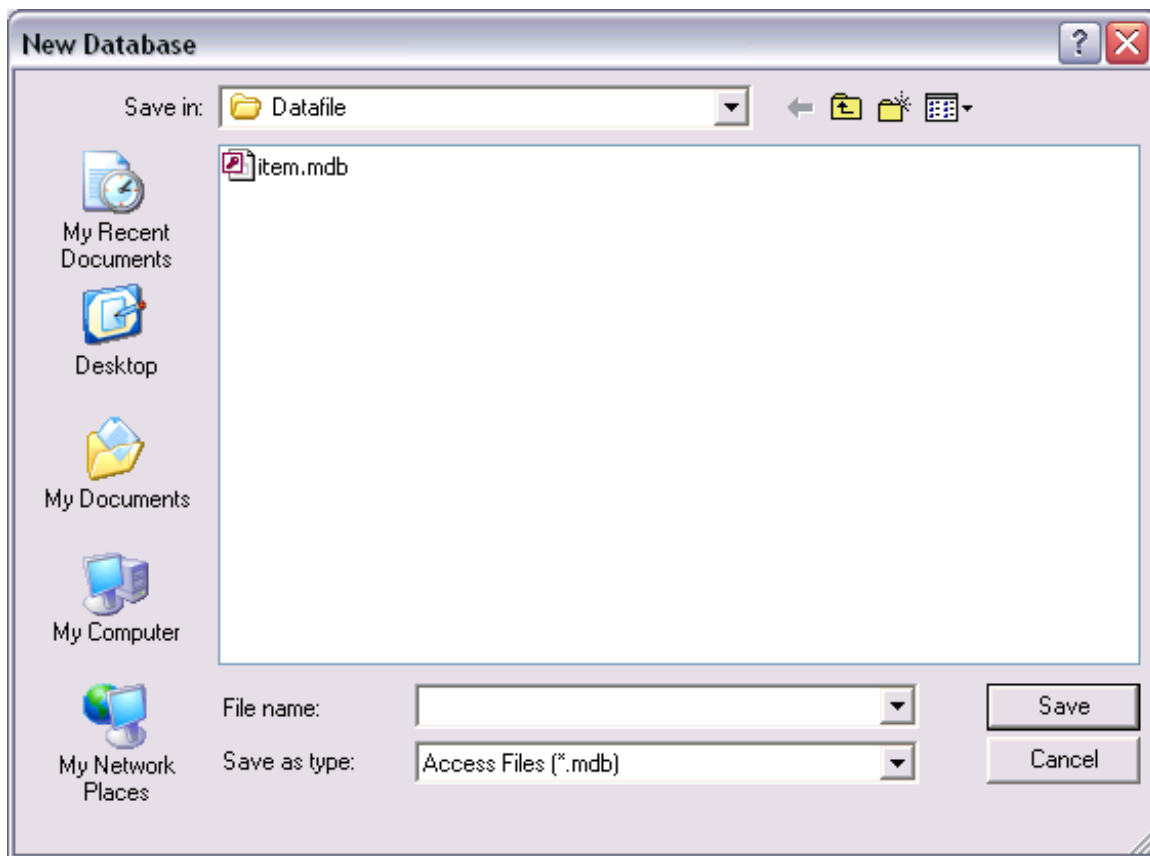
Shelf Logic® Enterprise Edition has the ability to create multiple item database files, however, you can only use one Item Database per plan. The default item database file is named Item.mdb (unless you have changed it) and is located in the DataFile subfolder.

Each time you start Shelf Logic® Enterprise Edition, the default database is automatically opened. To use a database other than Item.mdb, you must first create and activate the new database file as described below. Once a database is used to create a plan, it becomes permanently associated with that plan file and will automatically open each time the plan file is opened.

## Creating a New Database

Menu: File/New Database

Close any open plans. Upon executing the above command, the **Open** Database dialogue box will open as shown below:



**Figure 8. New Database**

Enter a name for the new database and click OK. The new database will become the active database until you select another one or close and restart Shelf Logic® Enterprise Edition. The Item Window will appear empty until items are entered into the new database.

# Sharing Files on a Network

If you are planning to store Shelf Logic® data files on a networked drive you must first install a licensed copy of Shelf Logic® on each user's workstation. Database and plan files can then be stored on a networked drive and accessed simultaneously from multiple workstations.

If a user is editing an item in Product Information, all subsequent users will be locked out of that record until the edit has been completed and saved. Multiple users can also access a single plan file but only the first user can save changes to that plan. All subsequent users will have a "read only" copy.

## Setting the Default Database

The default database is preset to C:\Program Files\Shelf Logic Enterprise Edition\Datafile\Item.mdb and should be moved to the network drive using Windows Explorer; or create a new database to be set as the default.

To Create a New Database:

1. Open Shelf Logic® Enterprise Edition
2. Select File Menu/New Database
3. Name the database file and save it on the network drive

From Each Workstation:

1. Select View Menu/Preferences
2. Click the Browse Button
3. Select the new default database
4. Click OK



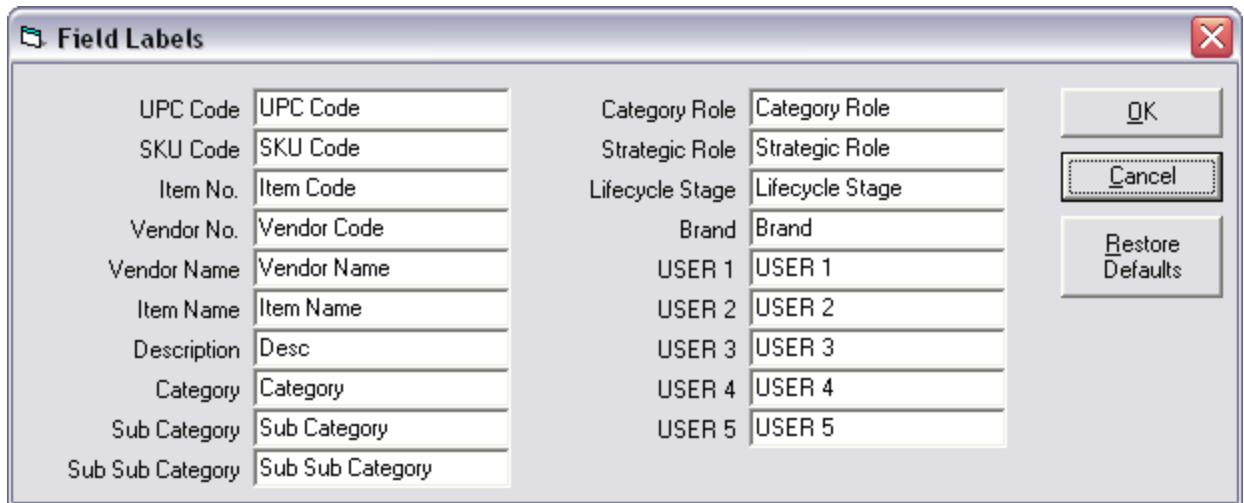
***Note: you must close and restart Shelf Logic® Enterprise Edition for the new default to take effect.***

# Field Mapping

The Field Mapping feature lets you change the name of many fields in the database. You can take a field, like Vendor Name, and call it something else, like “Ranking”, or “Bin Location”, for example.

The new field name is used throughout the program, on reports, product information screen, exports, everywhere the field name is used.

To change the field names, select “Field Mapping” from the Edit menu. You will see the following window.

The image shows a software window titled "Field Labels" with a close button (X) in the top right corner. The window contains two columns of text input fields. The left column lists various database fields, and the right column shows their current values. On the right side of the window, there are three buttons: "OK", "Cancel", and "Restore Defaults".

UPC Code	UPC Code
SKU Code	SKU Code
Item No.	Item Code
Vendor No.	Vendor Code
Vendor Name	Vendor Name
Item Name	Item Name
Description	Desc
Category	Category
Sub Category	Sub Category
Sub Sub Category	Sub Sub Category
Category Role	Category Role
Strategic Role	Strategic Role
Lifecycle Stage	Lifecycle Stage
Brand	Brand
USER 1	USER 1
USER 2	USER 2
USER 3	USER 3
USER 4	USER 4
USER 5	USER 5

You can change any of the USER fields to suit your needs. Or you can change the name of other fields you might want for other purposes.

The default field names are shown above.

# User Fields

There are a large number of user definable fields available at various levels, at the plan level, the segment level, shelf and fixture level, position level and product level.

For each plan, segment, fixture, position and product, there is a set of user fields, consisting of

- 50 fields for alphanumeric descriptions
- 50 fields for numbers
- 20 fields for a yes/no or true/false answer
- 4 Option fields with 5 choices per option
- 12 Combo Boxes with 10 selections per combo box

There is one set of user fields for the plan. Each segment has a set of user fields. For each shelf and fixture, there's a set of user fields. Each position and each product also has their own sets of user fields.

Entering information into user fields is done through the User Fields window, which is shown below.

Product: 1600027519 ☐ Change Labels

OK Cancel

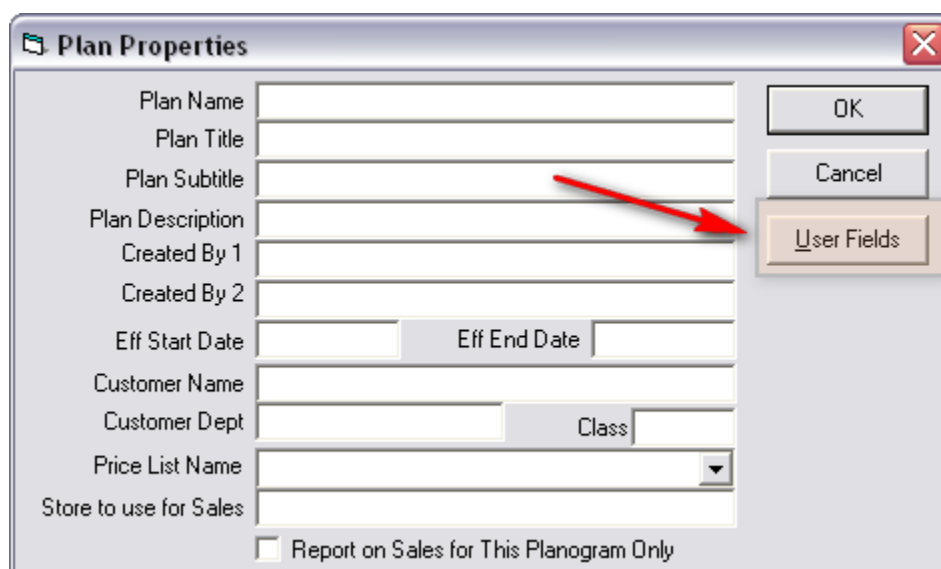
Descriptions	Values	True/False	Options	Selections
Label	Value			
User Desc 1				
User Desc 2				
User Desc 3				
User Desc 4				
User Desc 5				
User Desc 6				
User Desc 7				
User Desc 8				
User Desc 9				
User Desc 10				
User Desc 11				
User Desc 12				

All of the labels (User Desc 1, User Desc 2, etc) can be changed to describe the information you want to enter.

This window can be reached by clicking on the “User Fields” button, which is on various screens.

## Plan Level User Fields

To change user fields associated with the plan, click on the User Fields button on the *Plan Property* window, shown below.

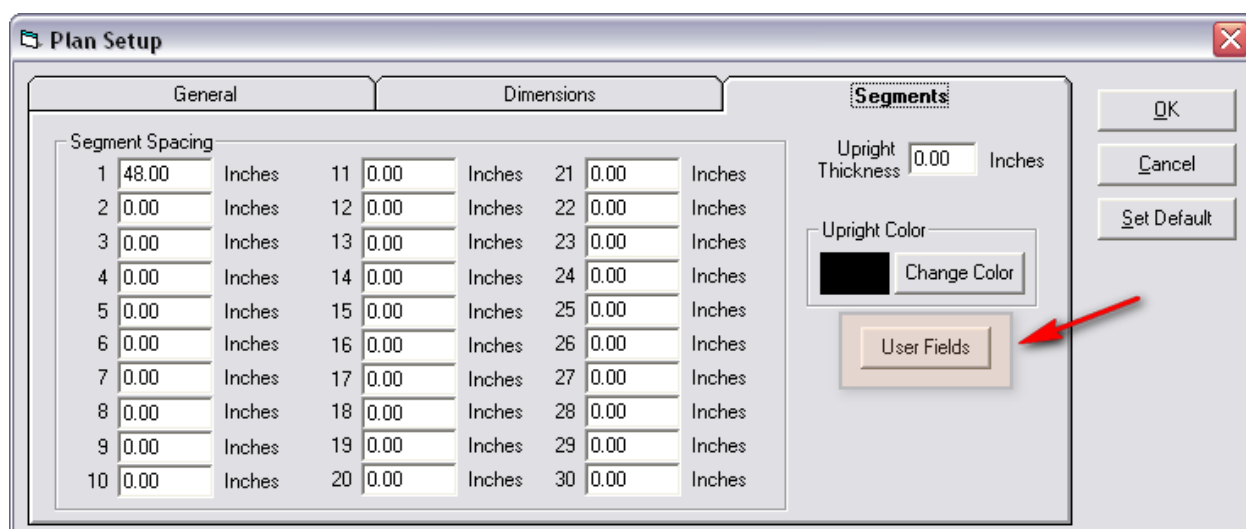


The **Plan Properties** dialog box contains the following fields and controls:

- Plan Name
- Plan Title
- Plan Subtitle
- Plan Description
- Created By 1
- Created By 2
- Eff Start Date
- Eff End Date
- Customer Name
- Customer Dept
- Class
- Price List Name
- Store to use for Sales
- ☐ Report on Sales for This Planogram Only
- OK
- Cancel
- User Fields (highlighted with a red arrow)

## Segment Level User Fields

To change user fields associated with a segment, the User Fields button is on the Segment tab on the Product Information window, as shown below.



The **Plan Setup** dialog box has three tabs: General, Dimensions, and Segments. The Segments tab is active, showing a table of segment spacing and a User Fields button highlighted with a red arrow.

Segment Spacing		
1	48.00	Inches
2	0.00	Inches
3	0.00	Inches
4	0.00	Inches
5	0.00	Inches
6	0.00	Inches
7	0.00	Inches
8	0.00	Inches
9	0.00	Inches
10	0.00	Inches

Upright Thickness: 0.00 Inches

Upright Color: Change Color

User Fields (highlighted with a red arrow)

Before you see the User Fields window, you will be asked for which segment you want to enter user fields. Each segment has its own user field information.

## Shelf Level User Fields

To change user fields for shelves, there's a User Fields button when displaying information for each shelf, as shown below.

In order to enter User Fields for this shelf, you must enter a “Shelf ID”. Each shelf has its own user field information.

## Fixture Level User Fields

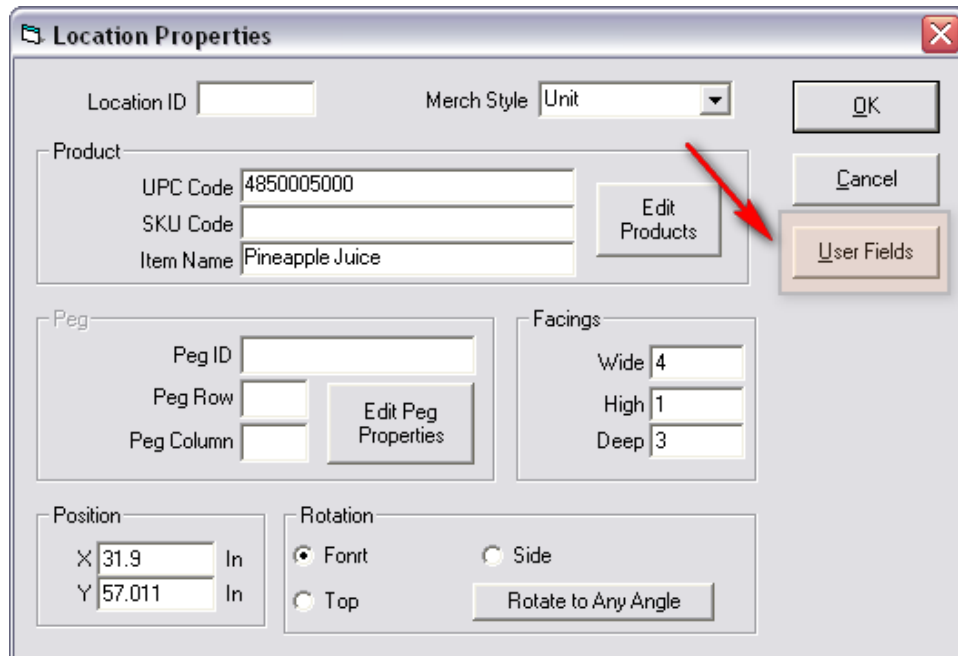
There's a User Fields button on the Fixture window as well, as shown below.

In order to enter User Fields for this fixture, you must enter a “Fixture ID”. Each fixture has its own user field information.



## Position Level User Fields

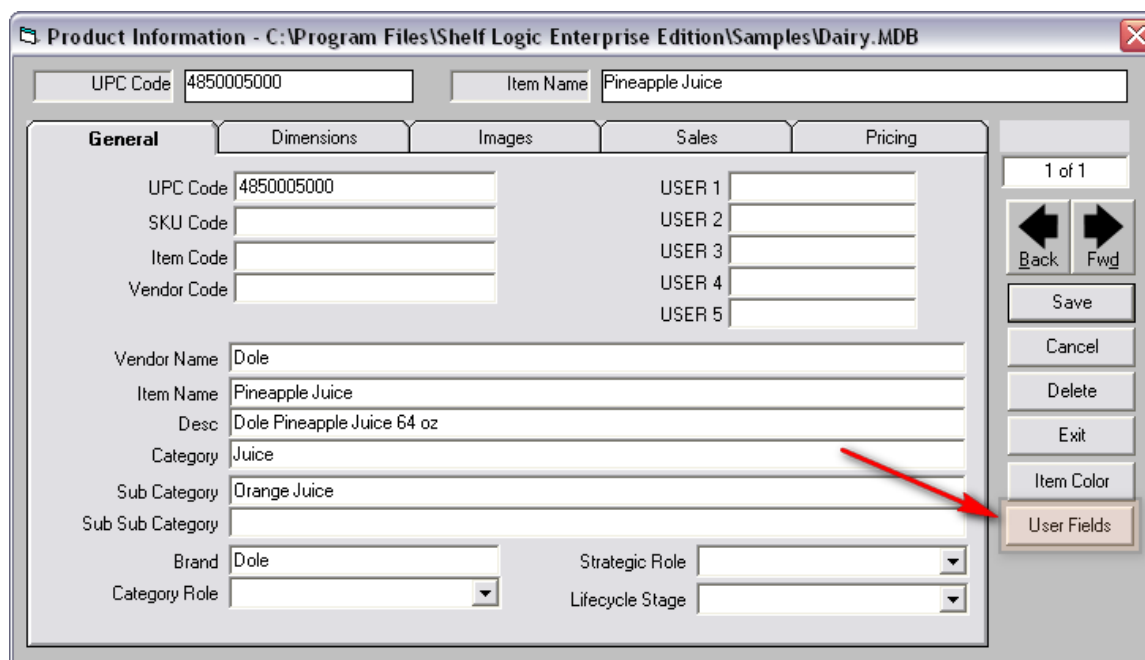
To enter user fields for a position, there's a User Fields button on the Location Properties window, as shown below.



The 'Location Properties' dialog box is shown. It contains fields for Location ID, Merch Style, Product (UPC Code, SKU Code, Item Name), Peg (Peg ID, Peg Row, Peg Column), Facings (Wide, High, Deep), Position (X, Y), and Rotation (Front, Side, Top). A red arrow points to the 'User Fields' button, which is highlighted in orange.

## Product Level User Fields

To enter user fields for a product, there's a User Fields button on the Product Information window, as shown below.

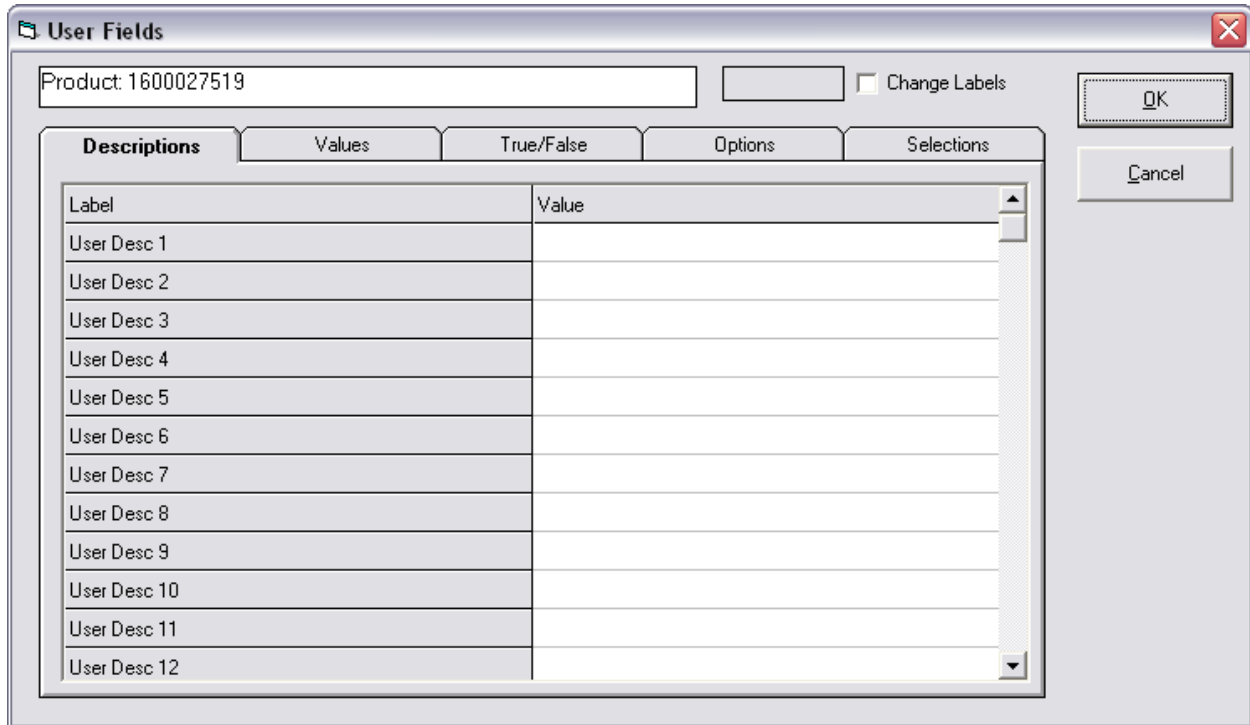


The 'Product Information' window is shown. It contains fields for UPC Code, Item Name, Vendor Name, Item Name, Desc, Category, Sub Category, Sub Sub Category, Brand, Category Role, Strategic Role, and Lifecycle Stage. A red arrow points to the 'User Fields' button, which is highlighted in orange.

If you click on the User Fields button, the information you enter is for this product only. Each product has its own unique set of user field information.

# User Field Types

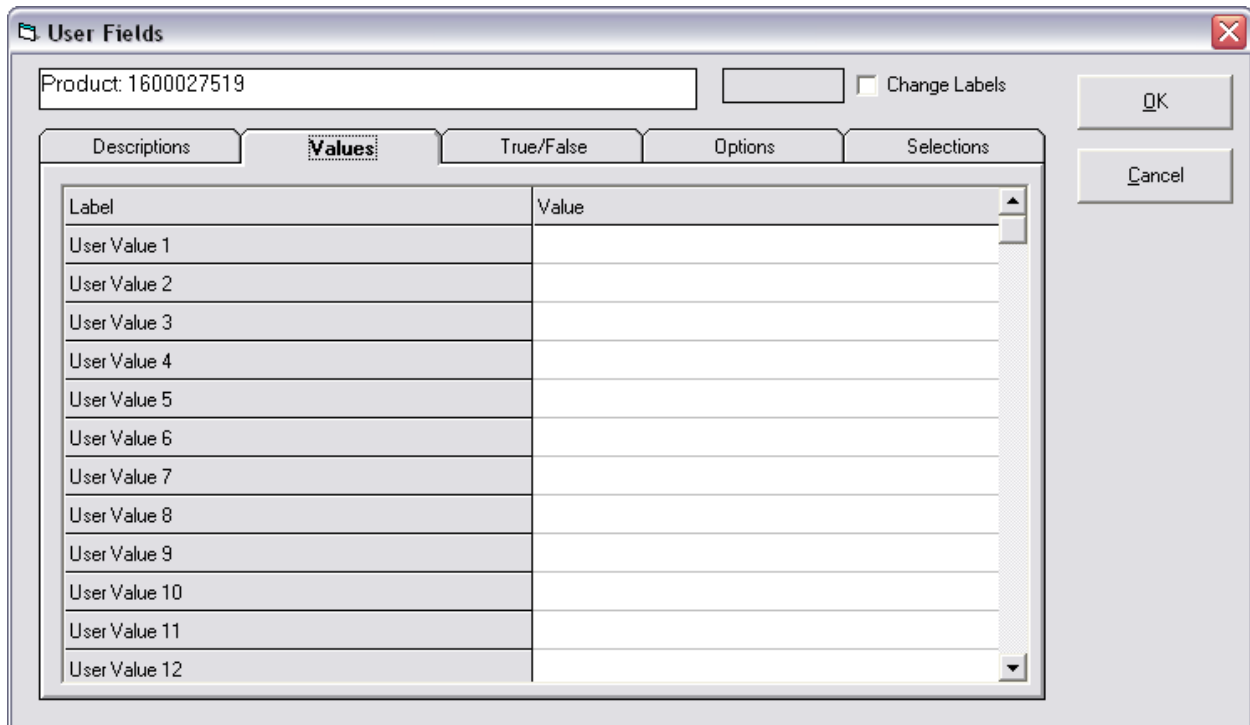
There's a great deal of information that can be entered for user fields. The first tab, the *Description* tab, lets you enter up to 50 alphanumeric descriptions.



The 'User Fields' dialog box is shown with the 'Descriptions' tab selected. At the top, there is a text field containing 'Product: 1600027519' and a checkbox labeled 'Change Labels' which is currently unchecked. Below this, there are five tabs: 'Descriptions', 'Values', 'True/False', 'Options', and 'Selections'. The 'Descriptions' tab is active, displaying a table with two columns: 'Label' and 'Value'. The 'Label' column contains 12 entries, 'User Desc 1' through 'User Desc 12'. The 'Value' column is empty. To the right of the table are 'OK' and 'Cancel' buttons.

Label	Value
User Desc 1	
User Desc 2	
User Desc 3	
User Desc 4	
User Desc 5	
User Desc 6	
User Desc 7	
User Desc 8	
User Desc 9	
User Desc 10	
User Desc 11	
User Desc 12	

The second tab, the *Values* tab, lets you enter up to 50 numbers, with decimals if desired. Only numbers can be entered here. This is shown in the figure below



The 'User Fields' dialog box is shown with the 'Values' tab selected. The layout is identical to the previous image, but the 'Values' tab is active. The table now has 12 entries in the 'Label' column, 'User Value 1' through 'User Value 12', and the 'Value' column remains empty. The 'OK' and 'Cancel' buttons are still present on the right.

Label	Value
User Value 1	
User Value 2	
User Value 3	
User Value 4	
User Value 5	
User Value 6	
User Value 7	
User Value 8	
User Value 9	
User Value 10	
User Value 11	
User Value 12	

The third tab, the *True/False* tab, displays 20 checkboxes and you can check them to indicate a true (or yes). This is shown in the figure below

The screenshot shows the 'User Fields' dialog box with the 'True/False' tab selected. At the top, there is a text field containing 'Product: 1600027519' and a 'Change Labels' checkbox. Below this are five tabs: 'Descriptions', 'Values', 'True/False', 'Options', and 'Selections'. The 'True/False' tab is active, displaying a grid of 20 checkboxes labeled 'True/False 1' through 'True/False 20'. On the right side of the dialog, there are 'OK' and 'Cancel' buttons.

The fourth tab, the Options tab, let you choose 4 options. You can have up to 5 option choices for each option. This is shown in the figure below

The screenshot shows the 'User Fields' dialog box with the 'Options' tab selected. The layout is similar to the previous tab, with the 'Options' tab active. It displays four groups of radio buttons, each labeled 'Option Label 1' through 'Option Label 4'. Each group contains five radio buttons labeled 'Option 1' through 'Option 5'. The 'OK' and 'Cancel' buttons are on the right.

The last tab, the Selections tab, lets you select up to 12 choices from combo boxes. Each combo box can have up to 10 choices. This is shown in the figure below

The screenshot shows a 'User Fields' dialog box with a title bar containing a close button (X). Inside the dialog, there is a text field labeled 'Product: 1600027519' and a checkbox labeled 'Change Labels'. Below these are five tabs: 'Descriptions', 'Values', 'True/False', 'Options', and 'Selections'. The 'Selections' tab is active, showing a list of 12 items labeled 'Selection 1' through 'Selection 12'. Each item has a corresponding dropdown menu to its right. On the right side of the dialog, there are 'OK' and 'Cancel' buttons.

Descriptions	Values	True/False	Options	Selections
Selection 1				
Selection 2				
Selection 3				
Selection 4				
Selection 5				
Selection 6				
Selection 7				
Selection 8				
Selection 9				
Selection 10				
Selection 11				
Selection 12				

# Changing User Field Labels

## Changing Description Labels

It's very simple to change any label in the user fields. First, check the *Change Labels* button. The screen will appear as below.

Label	Value
User Desc 1	
User Desc 2	
User Desc 3	
User Desc 4	
User Desc 5	
User Desc 6	
User Desc 7	
User Desc 8	
User Desc 9	
User Desc 10	
User Desc 11	

You can change any description label by clicking on it and just entering the new label.

## Changing Value Labels

You can change any value label by clicking on it and just entering the new label.

Label	Value
User Value 1	
User Value 2	
User Value 3	
User Value 4	
User Value 5	
User Value 6	
User Value 7	
User Value 8	
User Value 9	
User Value 10	
User Value 11	

## Changing True/False Labels

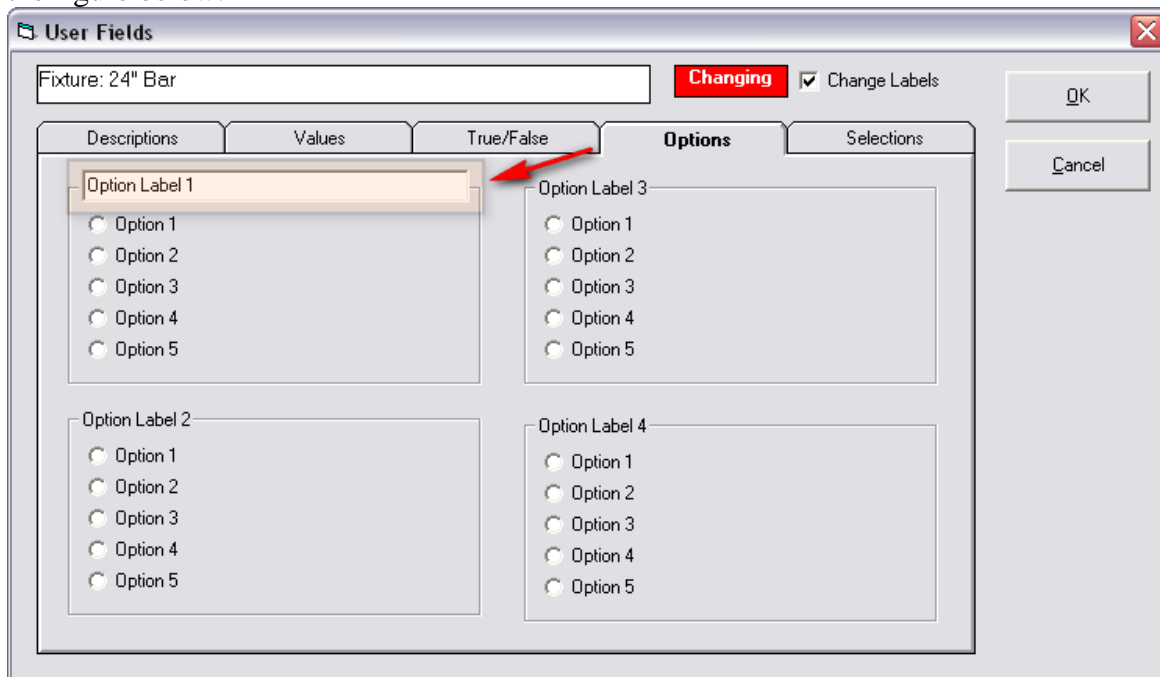
You can change any True/False label by just clicking on it. Then you can enter a new label.

The screenshot shows the 'User Fields' dialog box with the 'True/False' tab selected. A red arrow points to the 'True/False 1' label, which is highlighted with a yellow border. The dialog includes a text field for 'Fixture: 24\" Bar' and a 'Changing' button. The 'Change Labels' checkbox is checked. The 'True/False' tab contains a list of 20 labels, each with a checkbox. The labels are arranged in two columns: 'True/False 1' through 'True/False 10' on the left, and 'True/False 11' through 'True/False 20' on the right. The 'True/False 1' label is highlighted with a yellow border. The 'True/False' tab is selected, and the 'Options' and 'Selections' tabs are also visible. The 'OK' and 'Cancel' buttons are located on the right side of the dialog.

Descriptions	Values	True/False	Options	Selections
		<input type="checkbox"/> True/False 1	<input type="checkbox"/> True/False 11	
		<input type="checkbox"/> True/False 2	<input type="checkbox"/> True/False 12	
		<input type="checkbox"/> True/False 3	<input type="checkbox"/> True/False 13	
		<input type="checkbox"/> True/False 4	<input type="checkbox"/> True/False 14	
		<input type="checkbox"/> True/False 5	<input type="checkbox"/> True/False 15	
		<input type="checkbox"/> True/False 6	<input type="checkbox"/> True/False 16	
		<input type="checkbox"/> True/False 7	<input type="checkbox"/> True/False 17	
		<input type="checkbox"/> True/False 8	<input type="checkbox"/> True/False 18	
		<input type="checkbox"/> True/False 9	<input type="checkbox"/> True/False 19	
		<input type="checkbox"/> True/False 10	<input type="checkbox"/> True/False 20	

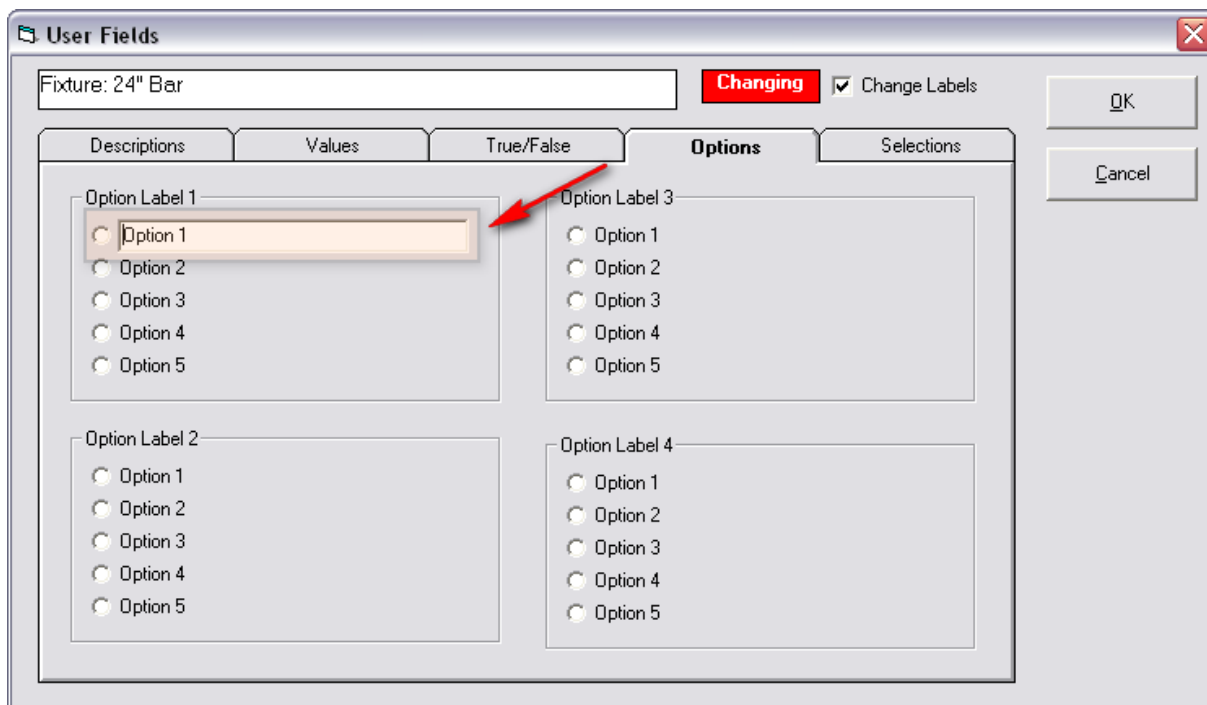
## Change Options Labels

There are two types of labels used here. The first is to enter the option description, as shown in the figure below.



The screenshot shows the 'User Fields' dialog box with the 'Options' tab selected. The 'Fixture: 24" Bar' is entered in the top text field. A red arrow points to the 'Option Label 1' text field. The 'Options' tab contains four panels, each with a label and a list of five radio button options. The panels are labeled 'Option Label 1', 'Option Label 2', 'Option Label 3', and 'Option Label 4'. The 'Option Label 1' panel is highlighted with a red border. The 'Changing' button is red and the 'Change Labels' checkbox is checked. The 'OK' and 'Cancel' buttons are at the bottom right.

Next, change the labels for each option you want to use. In the figure below, we're changing the label for the first option choice.

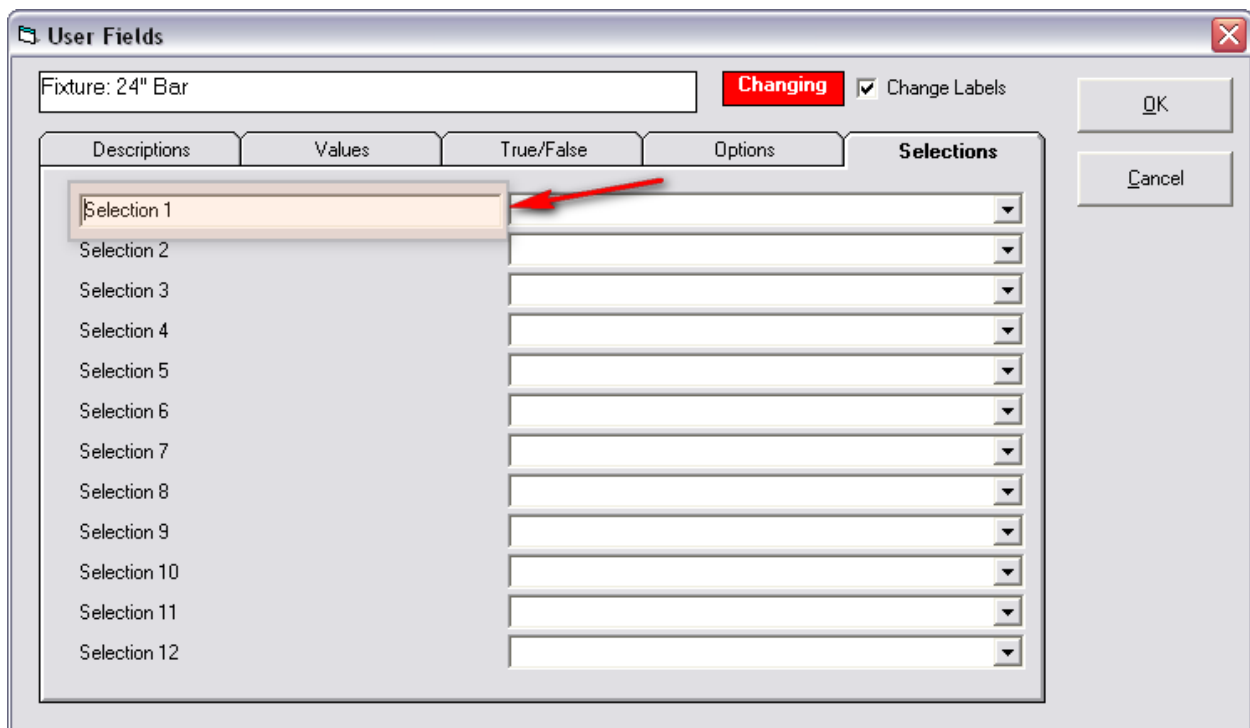


The screenshot shows the 'User Fields' dialog box with the 'Options' tab selected. The 'Option Label 1' panel is highlighted with a red border. The first option choice, 'Option 1', is selected with a radio button. A red arrow points to the first option choice. The 'Option Label 1' text field is also highlighted. The 'Option Label 1' panel contains a list of five radio button options: 'Option 1', 'Option 2', 'Option 3', 'Option 4', and 'Option 5'. The 'Option Label 2' panel also contains a list of five radio button options. The 'Option Label 3' panel contains a list of five radio button options. The 'Option Label 4' panel contains a list of five radio button options. The 'Changing' button is red and the 'Change Labels' checkbox is checked. The 'OK' and 'Cancel' buttons are at the bottom right.

You can have up to 5 options choices. If you don't want 5 choices, then erase the option choice labels you don't need and they won't show up when you are actually entering user field information.

## Changing Selection Labels

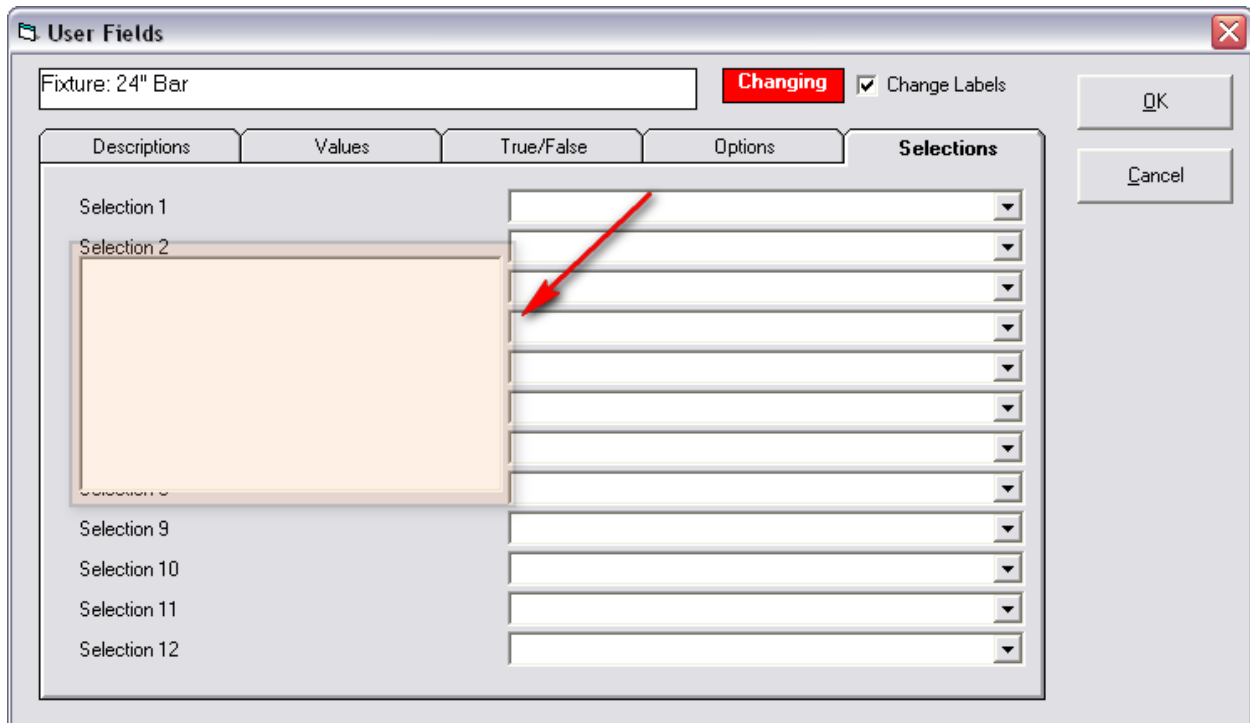
There are two types of labels used here. The first is to enter the selection description, as shown in the figure below.



The 'User Fields' dialog box is shown with the 'Fixtured: 24" Bar' text in the top input field. A red 'Changing' button and a checked 'Change Labels' checkbox are visible. The 'Selections' tab is active, displaying a list of 12 selection items. 'Selection 1' is highlighted with an orange background, and a red arrow points to its corresponding dropdown menu.

Descriptions	Values	True/False	Options	Selections
Selection 1				
Selection 2				
Selection 3				
Selection 4				
Selection 5				
Selection 6				
Selection 7				
Selection 8				
Selection 9				
Selection 10				
Selection 11				
Selection 12				

Next you need to enter one or more selection choices for each selection as shown below..



The 'User Fields' dialog box is shown with the 'Fixtured: 24" Bar' text in the top input field. A red 'Changing' button and a checked 'Change Labels' checkbox are visible. The 'Selections' tab is active, displaying a list of 12 selection items. 'Selection 2' is highlighted with an orange background, and a red arrow points to its corresponding dropdown menu.

Descriptions	Values	True/False	Options	Selections
Selection 1				
Selection 2				
Selection 3				
Selection 4				
Selection 5				
Selection 6				
Selection 7				
Selection 8				
Selection 9				
Selection 10				
Selection 11				
Selection 12				



Enter each selection choice, then press <ENTER> to go to the next line. In the figure below, we've entered 7 selection choices.

The screenshot shows the 'User Fields' dialog box with the 'Selections' tab selected. The 'Fixture: 24" Bar' field is at the top. Below it are tabs for Descriptions, Values, True/False, Options, and Selections. The Selections tab is active, showing a list of 12 selection fields. A red arrow points to the first selection field, which has a dropdown menu open showing 7 color options: Red, Green, Yellow, Blue, Purple, Orange, and Brown. The 'Changing' button is highlighted in red, and the 'Change Labels' checkbox is checked. OK and Cancel buttons are on the right.

When you finish changing labels and are entering user field information, your choices will appear in the combo box, as shown in the figure below.

The screenshot shows the 'User Fields' dialog box with the 'Selections' tab selected. The 'Fixture: 24" Bar' field is at the top. Below it are tabs for Descriptions, Values, True/False, Options, and Selections. The Selections tab is active, showing a list of 12 selection fields. A red arrow points to the first selection field, which has a dropdown menu open showing 7 color options: Red, Green, Yellow, Blue, Purple, Orange, and Brown. The 'Change Labels' checkbox is unchecked. OK and Cancel buttons are on the right.

If you save your plan as a PSA format file, then the first 20 user description fields, the first 20 user value fields and the first 10 true/false fields will be mapped to the file.

Likewise, if you load a PSA formatted file, any user descriptions, values and true/false fields will be mapped to the Shelf Logic user fields.

# Exporting and Importing Files

This section requires some knowledge of Excel. Contact your System Administrator for assistance if necessary. The export and import commands are used to transfer data between Shelf Logic® Enterprise Edition and other applications for the following:

**Creating Custom Reports** - Create the planogram in Shelf Logic® Enterprise Edition. Export the planogram into Excel or Word according to the directions in this section. The data can then be moved, formatted, or edited. Formulas can also be added.

**Creating a New Items Database** - First export the Item.mdb file from Shelf Logic® Enterprise Edition to Excel. This will create the Excel spreadsheet with the correct layout. Enter your items according to the instructions in this section, and finally, import the database back into Shelf Logic® Enterprise Edition.

**Editing the Items Database** - Export the Shelf Logic® Enterprise Edition Items Database into Excel for major revisions or routine maintenance.

**Importing a Database from Another Program** - If you are using a database that was created for another application, it must be imported into Excel and modified for use with Shelf Logic® Enterprise Edition. In order to prepare your database for import into Excel your database should have a supported export file format such as ASC, DBF or CSV. Please check Excel help for a list of supported file formats. Our recommendation is to use the ASC format as database programs almost universally support it.

**Why Microsoft Excel** – Excel supports many file formats and is the most popular spreadsheet program. You can also use Excel as an intermediary if you wish to do data entry in a different program such as Microsoft Access. Just import the Excel spreadsheet directly into Access, add or edit records and then export the file back to Excel or directly to ASC (.csv, .txt).



**\*\*\*Be sure to backup all .mdb files before any import or export procedure.**

# Exporting and Importing a Database

## Exporting the Item File from Shelf Logic® to Excel

Menu: File/Export Item File

This is the first step in creating or editing a database in Excel. This procedure will create the Shelf Logic® Enterprise Edition database structure in the form of an Excel spreadsheet. A new database can then be entered, or an existing one can be edited. If you need to perform operations on the database, then exporting it to Excel for programmed manipulation and then importing it back again into Shelf Logic can be more accurate and save a great deal of time over manual editing.

The Excel spreadsheet is essentially a database laid out in the form of columns and rows. Database fields will appear as columns and items are entered in rows. The first row will contain the field names, and items begin on row 2.

Upon executing the above menu command, the active database file will be exported into a comma delimited .CSV file. The standard Windows Save File dialogue box will open. Accept the default location for the export file (C:\Program Files\Shelf Logic Enterprise Edition\datafile) and enter a file name. The extension of .CSV will be added automatically.

## Creating the Items Database in Excel

Open Excel and the .CSV file created in the previous step. You can begin entering items according to the following instructions. If you are working with a database from another application you can copy and paste one column at a time into the appropriate Shelf Logic® column and modify the data as needed.

Some fields are required and/or require data to be entered in a specific format, such as a date or number. The number of characters in each column should not exceed the maximum field size or they will be lost when imported back to Shelf Logic®. The following chart lists the requirements for each field.

## Exporting the Item Database

When exporting the Item file to Excel, you will notice an asterisk in front of each UPC code. This is to preserve text formatting and ensure that leading zeros will not be lost in Excel. We suggest entering new codes the same way. The asterisk is removed when importing back into Shelf Logic®.



**Note:** The UPC Code is the key database field and must contain a unique number for each item.

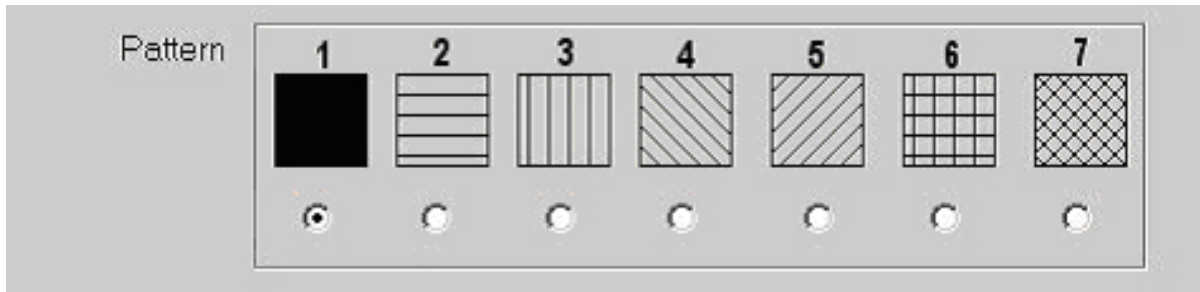
## Database Fields Chart

Column Name & Letter	Required Entry	Max Characters	Required Format (Data Type)
A - UPC Code	Required	(25)	Must be a unique number for each item.
B - Item Code		(25)	User defined, alphanumeric.
C - SKU Code		(25)	User defined, alphanumeric.
D - Vendor Code		(25)	User defined, alphanumeric.
E - Vendor Name		(50)	User defined, alphanumeric.
F - Item Name		(50)	User defined, alphanumeric.
G - Item Type	Required	(1)	S=Shelf Item P=Peg Item I=Sign Item
H - Category		(50)	User defined, alphanumeric.
I – Sub Category		(50)	User defined, alphanumeric.
J – Sub Sub Category		(50)	User defined, alphanumeric.
K – Category Role		(25)	User defined, alphanumeric.
L – Strategic Role		(25)	User defined, alphanumeric.
M – Lifestyle Stage		(25)	User defined, alphanumeric.
N - Description		(50)	User defined, alphanumeric.
O – Unit Width		(8)	in/cm in whole numbers or decimals.
P - Unit Height		(8)	in/cm in whole numbers or decimals.
Q - Unit Depth		(8)	in/cm in whole numbers or decimals.
R - Unit Units		(8)	Whole numbers
S - Unit Cost		(8)	Currency
T - Unit Sell Price		(8)	Currency
U – Unit Retail Price		(8)	Currency
V – Tray Width		(8)	in/cm in whole numbers or decimals.
W - Tray Height		(8)	in/cm in whole numbers or decimals.
X – Tray Depth		(8)	in/cm in whole numbers or decimals.
Y - Tray Units		(8)	Whole numbers
Z - Tray Cost		(8)	Currency
AA - Tray Sell Price		(8)	Currency
AB - Tray Retail Price		(8)	Currency
AC – Case Width		(8)	in/cm in whole numbers or decimals.
AD - Case Height		(8)	in/cm in whole numbers or decimals.
AE – Case Depth		(8)	in/cm in whole numbers or decimals.
AF – Case Units		(8)	Whole numbers
AG - Case Cost		(8)	Currency
AH - Case Sell Price		(8)	Currency
AI - Case Retail Price		(8)	Currency
AJ – Display Width		(8)	in/cm in whole numbers or decimals.
AK - Display Height		(8)	in/cm in whole numbers or decimals.
AL - Display Depth		(8)	in/cm in whole numbers or decimals.
AM - Display Units		(8)	Whole numbers
AN - Display Cost		(8)	Currency
AO - Display Sell Price		(8)	Currency
AP - Display Retail		(8)	Currency
AQ – Alternate Width		(8)	in/cm in whole numbers or decimals.

AR - Alternate Height		(8)	in/cm in whole numbers or decimals.
AS - Alternate Depth		(8)	in/cm in whole numbers or decimals.
AT - Alternate Units		(8)	Whole numbers
AU - Alternate Cost		(8)	Currency
AV - Alternate Sell		(8)	Currency
AW - Alternate Retail		(8)	Currency
AX – Merch Style		(1)	0=Units 1=Tray 2=Case 3=Display
AY - Brand		(50)	User defined, alphanumeric.
AZ - Weight		(8)	Whole numbers or decimals.
BA – Weight UM		(2)	User defined, alphanumeric.
BB - Peg Type		(2)	1=single hole hook 2=double hole single hook 3= double hole single hook with label 4=double hole Rounded wire 5= double hole Rounded wire with label
BC – Peghole1 Left		(10)	Whole numbers or decimals.
BD – Peghole1 Top		(10)	Whole numbers or decimals.
BE – Last Sales ID			Reserved for program
BF - Last Changed		(8)	Current date will automatically be inserted. No entry required.
BG - Outline Color		(2)	Windows color as long number
BH - Fill Color		(2)	Windows color as long number
BI - Pattern		(2)	Enter a number from pattern chart.
BJ - Image Name		(100)	Path and name of image file.
BK – Tray Image Name		(100)	Path and name of image file.
BL – Case Image Name		(100)	Path and name of image file.
BM – Display Image Name		(100)	Path and name of image file.
BN – Alternate Image Name		(100)	Path and name of image file.
BO – Shape Number			Number in Shape List
BP – Shape Name			Path and name of shape image file.
BQ – Transparent Color		(8)	Transparent background color or –1 if none.
BR – Nest Amount		(8)	in/cm in whole numbers or decimals.
BS - User1		(50)	User defined, alphanumeric.
BT - User2		(50)	User defined, alphanumeric.
BU - User3		(50)	User defined, alphanumeric.
BV – User4		(50)	User defined, alphanumeric.
BW – User5		(50)	User defined, alphanumeric.
BX – Metric		(3)	Current unit of measure will automatically be inserted. No entry required.

## Pattern Chart

Use the following chart to enter patterns.



**Figure 9. Pattern Chart**

## Saving the Export File

When the Excel file is completed Select File Menu/Save in Excel. You will receive several prompts from Excel trying to save the file in the native Excel format (XLS). The exact wording of the prompts varies depending upon the version of Excel, but do not save the file in XLS format. You must save it as a .CSV file.

# Importing the Item Database

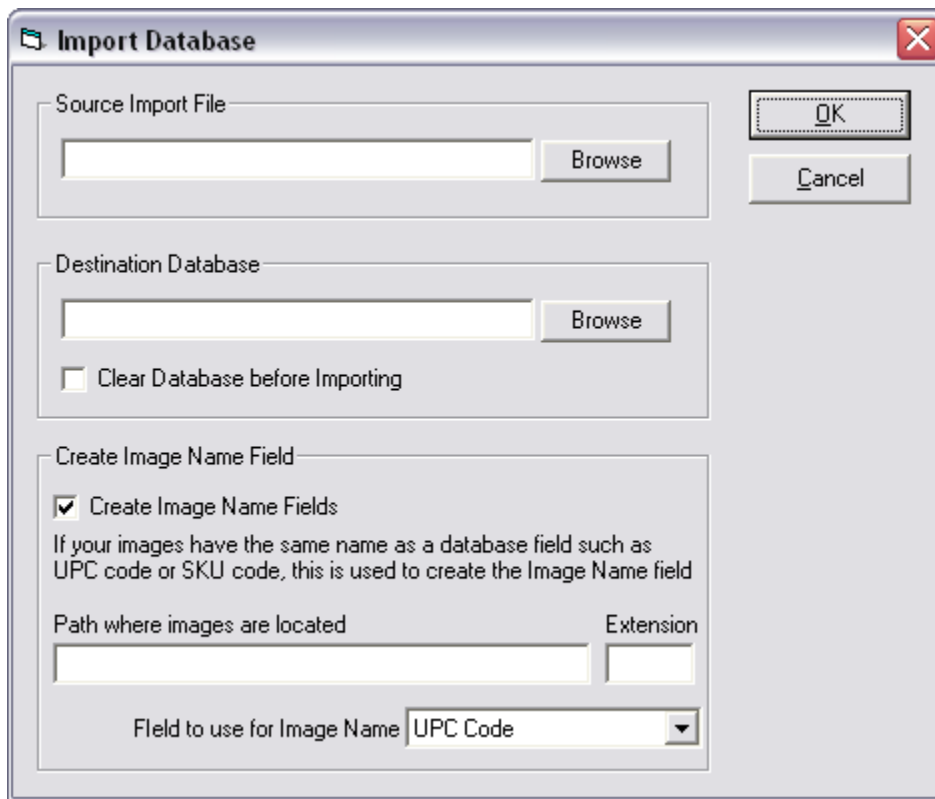
## Importing a .CSV File into Shelf Logic®

Menu: File/Import Item Database

This lets you import data from an Excel .CSV comma delimited file into Shelf Logic. You cannot import directly into a database being used by an open plan. You must close the plan first, then import the database.

There's a prototype .CSV file in your program directory called "Import Template.CSV". The first row has the field names. Fill in the required information and import it into a database.

When you enter the Import Item Database command, you will see the *Import Database* window, as shown in the figure below:



### *Source Import File*

Enter the source Excel .CSV file or click Browse and search for it.

### *Destination Database*

Then enter the destination database name and path or click Browse to search for it.

### *Clear Database before Importing*

If you want to clear the destination database before the import, then check the "Clear Database before Importing" checkbox.

When records are imported, they are added to the database if they don't already exist. If they are already in the database, the information in the source file will update the destination database record.

#### *Create Image Name Field*

If this is checked, this will let Shelf Logic create the image name field information using an existing field. The actual image name must also be named after this field. For example, if each image has the same name as the UPC code, you would specify using the UPC Code to create the field.

#### *Path where the Images are Located*

This is the path where the images are to be found.

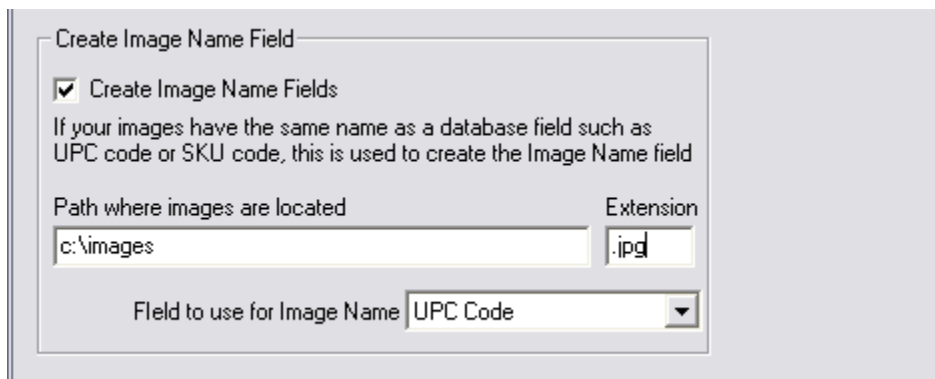
#### *Extension*

This is the image extension. For example, “.jpg” or “.png”.

#### *Field to use for Image Name*

This is the field used to name the images.

Here's an example.



The screenshot shows a dialog box titled "Create Image Name Field". Inside the dialog, there is a checked checkbox labeled "Create Image Name Fields". Below this checkbox is a text label: "If your images have the same name as a database field such as UPC code or SKU code, this is used to create the Image Name field". There are three input fields: "Path where images are located" with the text "c:\images", "Extension" with the text ".jpg", and "Field to use for Image Name" which is a dropdown menu currently showing "UPC Code".

So if a product has a UPC code of “123456789” then the image name field will be created as C:\images\123456789.jpg

If you are going to have three sided images, the use .1 as the extension, regardless of the type of image it is.



# Exporting Plans

## Exporting the plan file to Excel

Menu: File/Export Plan

The Shelf Logic<sup>®</sup> Enterprise Edition planogram can be exported into an Excel spreadsheet, or other application, for the creation of custom reports.

Upon executing the above command, the Windows File Save dialogue box will open. Select the default location or a new location and enter a file name. The .CSV extension will be added automatically.

When you open the .CSV file in Excel you can rearrange and format the data, add formulas, etc. Save the finished report file as an .XLS file to preserve formatting.

# Display Concepts

This chapter will introduce the basic concepts of creating a planogram. Additional features of Shelf Logic® Enterprise Edition are covered in Sections 6, 7 and 8.

The steps for creating a planogram are really very simple:

1. Define the display type and dimensions.
2. Add shelves to the display.
3. Add items to the display.

Your items are represented on the planogram by a scaled line art box, a custom shape, or a photographic image. Items can be placed anywhere on the planogram, however, warning messages will alert you when an item is not properly positioned, or if there is not enough space.

Up to 10 planograms can be opened in separate windows and you can drag and drop products and shelves between plans.

There are many ways to place shelves and products onto planograms and there are features to aid in the placement and moving of product faces on the plan.

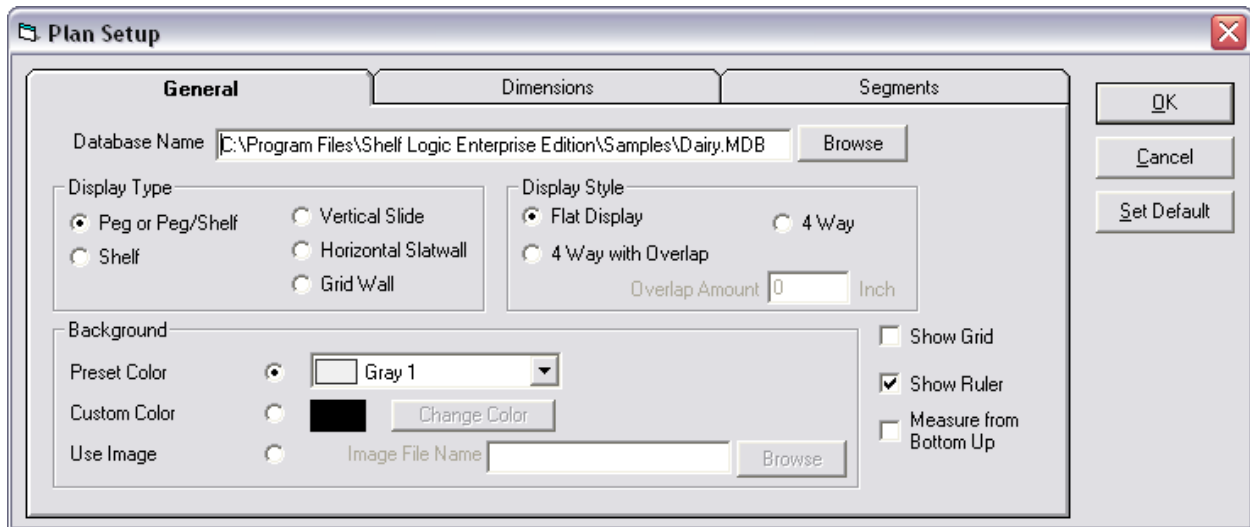
Each plan has a backboard that can be pegholes, vertical or horizontal slat walls, grid walls or nothing for use with shelves only. However, you can mix different types. Areas on the plan can be created with different backboards. So, for example, the entire plan backboard could be pegholes but you could have an area with a grid wall. Multiple areas, each with a different backboard, can be created.

Once the Display Setup is complete, the new planogram will appear in the Plan Window.

# Starting a New Plan

Hot Button:           New Plan  
Menu:                File/New

After executing one of the above commands, the Plan Setup Window will open as shown below.



The Plan Setup Window is divided into 4 sections, or tabs. The first is the “General” tab, shown above, which lets you enter the following information:

## General Tab

### Database Name

This is the name of the database used for this plan. You can click the “Browse” button to look for the database. In the above window, the “Dairy.mdb” in the “C:\Program Files\Shelf Logic Enterprise Edition\Samples\” folder has been selected.

### Display Type

This determines the overall plan backboard being used. You can still create areas that have other display types.

### Display Style

This determines if this is a flat display or a 4 sided display. You can select a 4 sided display where the sides meet in a corner, or create one where the sides overlap each other. In this case, you can enter the overlap amount.

When creating a 4 Way type display, it should have 4 segments, indicating the sides of the display. The first and third segments have to be of equal width and the second and fourth segments have to be of equal width. A 4 Way display can only be seen in 3D view, otherwise it just looks like a standard 4 segment flat display.

**Background**

This lets you define the kind of plan background you want. It can be a preset color similar to the ones in the Master Edition, or it can be any Windows color. In addition, you can have a photo background to create very realistic plans. You can enter or browse for the image file. This file is sized to fit the plan size so the photo covers the entire plan background.

**Measure from Bottom Up**

If you check this, the ruler will start at the bottom of the display and measure upwards from there. The ruler's zero point starts above the kickplate. This feature can be turned on and off while working on the plan, so you can switch the zero point from the top to the bottom of the display as needed.

**Show Grid & Show Ruler**

These features are used for item positioning and alignment. They can be turned on and off from Display Setup or from the View Menu. We suggest leaving the ruler on and the grid off for most displays.

## Dimensions Tab

The screenshot shows the 'Plan Setup' dialog box with the 'Dimensions' tab selected. The 'English (in)' radio button is chosen. The 'Display Length' is set to 8 Ft 0 In and 'Display Height' to 6 Ft 0 In. The 'Merch Style' dropdown is set to '<No override>'. Below these, there are input fields for 'Vertical distance between peg holes' (1 Inches), 'Horizontal distance between peg holes' (1 Inches), 'Vertical Spacing between Notches' (1 Inches), 'Kickplate' (3 Inches), and 'Default Peg Hook Length' (12 Inches). On the right side of the dialog, there are 'OK', 'Cancel', and 'Set Default' buttons. A note states: 'This overrides the Merch Style Settings made in Product Info and sets the default Merch Style for this plan only.'

The Dimensions Section shown above lets you enter the size of the plan and backboard spacing.

### English or Metric

This determines the unit of measurement used for the plan, either metric or English.

### Display Length & Display Height

These dimensions will determine the total area of your display. Measurements can be entered in feet, feet and inches, or all inches.

### Vertical Distance & Horizontal Distance Between Peg Holes

These measurements determine the type of pegboard used for the display background. A minimum of .5" must be entered. Standard pegboard is one inch vertical by one inch horizontal. If you prefer not to have a pegboard background, you can turn off the peg holes later from the View Menu.

### Vertical Spacing Between Notches

This is the vertical distance between the slots on the vertical uprights into which the shelves will be attached. One inch is standard for most gondola or wall shelving. With one-inch slot positions, shelf height and shelf movement must be in one-inch increments. With two-inch slot positions, shelf height and shelf movement must be in two-inch increments.

### Kickplate

This is the height of the kickplate or base unit. The kickplate appears as a solid black area at the bottom of the display. The top of the kickplate is the lowest possible position where a shelf may be placed, but it is not an actual shelf and cannot hold items.

### Default Peg Hook Size

Enter the default peg hook size for the display.

### Peg Hole Offset from Left

This is the distance from the left edge of the plan to the first peghole or vertical slat.

### Peg Hole Offset from Left

This is the distance from the top edge of the plan to the first peghole or horizontal slat.

### Merch Style

This sets a default merchandising style for this plan and overrides the default merchandising style set in the Product Info screen.

## Segments Tab

Segment Spacing		
1	48.00	Inches
2	40.00	Inches
3	0.00	Inches
4	0.00	Inches
5	0.00	Inches
6	0.00	Inches
7	0.00	Inches
8	0.00	Inches
9	0.00	Inches
10	0.00	Inches
11	0.00	Inches
12	0.00	Inches
13	0.00	Inches
14	0.00	Inches
15	0.00	Inches
16	0.00	Inches
17	0.00	Inches
18	0.00	Inches
19	0.00	Inches
20	0.00	Inches
21	0.00	Inches
22	0.00	Inches
23	0.00	Inches
24	0.00	Inches
25	0.00	Inches
26	0.00	Inches
27	0.00	Inches
28	0.00	Inches
29	0.00	Inches
30	0.00	Inches

Upright Thickness: 0.00 Inches

Upright Color: [Color Swatch] Change Color

User Fields

OK Cancel Set Default

The Sections Tab lets you enter the segment widths

### Section Spacing

These measurements will determine how many segments your display will have and the length of each segment. You can create up to 30 variable-sized segments per display. Enter the length of each segment in inches. If your display has only one segment, enter the total length in Section 1.



**Note:** *The total length of all the segments must add up to the total display length.*

### Upright Thickness

Vertical uprights are the framework onto which shelves are attached. For standard wall shelving or gondola shelving you may leave the thickness at zero. For heavy-duty pallet racks, the thickness of the uprights can impact available shelf space and must be accounted for within the total display size (see Pallet Rack Setup below).

### Upright Color

Clicking on the “Change Color” button lets you specify a color for the uprights on your plan. This opens up the standard Select Color Window where you can choose any color.

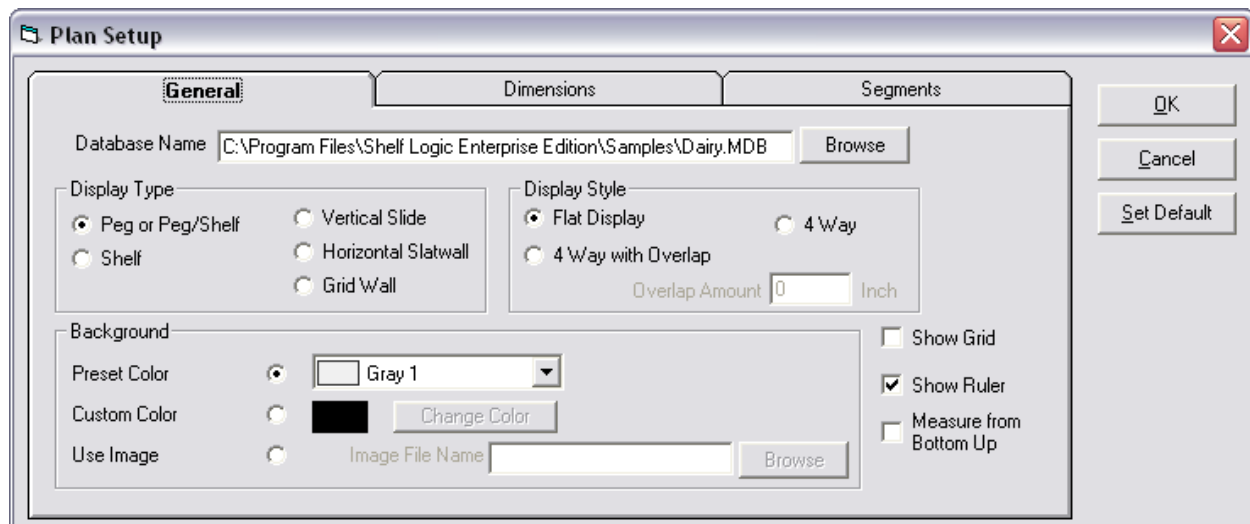
### Upright Color

This lets you enter User Fields for each segment. You will be asked for the desired segment number before entering user fields.

## Examples

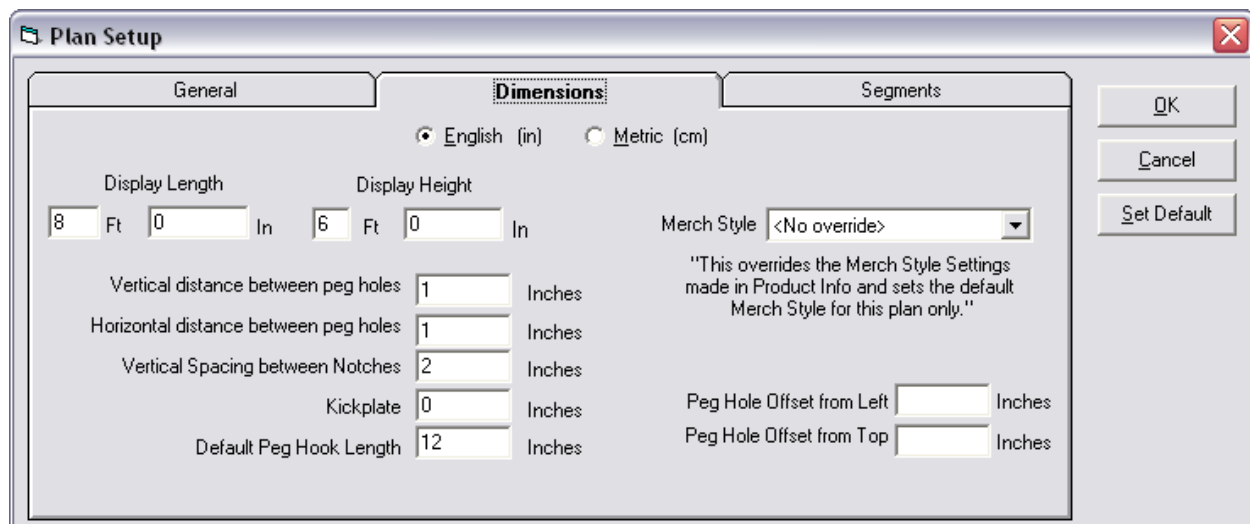
### Example 1. Pallet Rack Display Setup

The following screens will create a typical Pallet Rack plan. Select a *Display Type* of Peghole, a *Display Style* of Flat and your choice of background color.



The 'Plan Setup' dialog box is shown with the 'General' tab selected. The 'Database Name' is set to 'C:\Program Files\Shelf Logic Enterprise Edition\Samples\Dairy.MDB'. Under 'Display Type', 'Peg or Peg/Shelf' is selected. Under 'Display Style', 'Flat Display' is selected. The 'Background' section shows 'Preset Color' set to 'Gray 1'. On the right, 'Show Grid' is unchecked, 'Show Ruler' is checked, and 'Measure from Bottom Up' is unchecked. Buttons for 'OK', 'Cancel', and 'Set Default' are on the right.

Here we'll create an 8 foot wide plan with 2 inch notch spacing.



The 'Plan Setup' dialog box is shown with the 'Dimensions' tab selected. The units are set to 'English (in)'. 'Display Length' is 8 Ft 0 In and 'Display Height' is 6 Ft 0 In. 'Vertical distance between peg holes' is 1 Inch, 'Horizontal distance between peg holes' is 1 Inch, and 'Vertical Spacing between Notches' is 2 Inches. 'Kickplate' is 0 Inches and 'Default Peg Hook Length' is 12 Inches. 'Merch Style' is set to '<No override>'. On the right, 'Peg Hole Offset from Left' and 'Peg Hole Offset from Top' are both 0 Inches. A note states: 'This overrides the Merch Style Settings made in Product Info and sets the default Merch Style for this plan only.' Buttons for 'OK', 'Cancel', and 'Set Default' are on the right.

For the segments, we'll have only one segment. But the Pallet Rack part comes when we have uprights that have dimensions, 4 inches in this case.

Segment Spacing		
1	96.00	Inches
2	0.00	Inches
3	0.00	Inches
4	0.00	Inches
5	0.00	Inches
6	0.00	Inches
7	0.00	Inches
8	0.00	Inches
9	0.00	Inches
10	0.00	Inches
11	0.00	Inches
12	0.00	Inches
13	0.00	Inches
14	0.00	Inches
15	0.00	Inches
16	0.00	Inches
17	0.00	Inches
18	0.00	Inches
19	0.00	Inches
20	0.00	Inches
21	0.00	Inches
22	0.00	Inches
23	0.00	Inches
24	0.00	Inches
25	0.00	Inches
26	0.00	Inches
27	0.00	Inches
28	0.00	Inches
29	0.00	Inches
30	0.00	Inches

Upright Thickness: 4.00 Inches

Upright Color: [Color Swatch] [Change Color](#)

[User Fields](#)

[OK](#) [Cancel](#) [Set Default](#)

A pallet rack display is created the same as a shelf/peg display with the exception of the upright thickness. Vertical uprights are the framework onto which shelves are attached. For standard wall shelving or gondola shelving you may leave the thickness at zero since shelves attach at the back of the display. For heavy-duty pallet racks, the thickness of the uprights can impact available shelf space and must be accounted for.

When the upright thickness is set to a number greater than zero, the combined measurement of the uprights must be subtracted from the segment lengths. Failure to do so will cause the following warning message: “The display width is too small to fit the segments that were entered.”

For this Example:

- Display length = 8 feet (96 inches)
- Thickness of Vertical Uprights = 4 inches
- Number of segments in the display = 1
- Total number of uprights = 2 (one on either side of the display)
- Combined measurement of the 2 uprights = 8 inches
- Section spacing must be 88 inches. (total width of 96 inches minus upright total of 8)



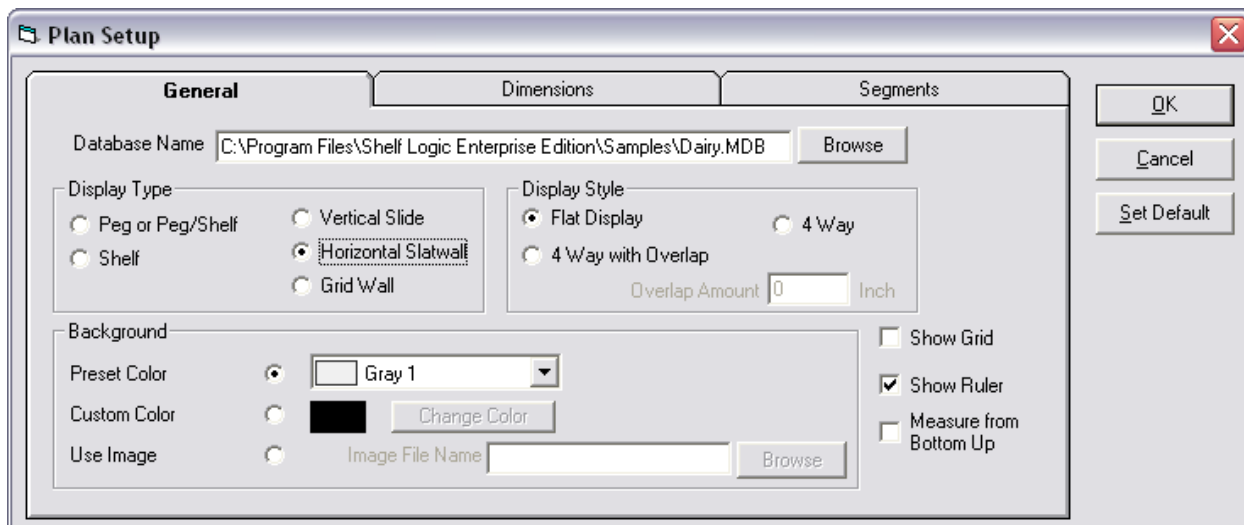
**Note:** The total length of all segments must equal the total display length.

*You are now ready to add shelves to a shelf/peg or pallet rack display.  
For pegboard displays, you are ready to add items and/or floating shelves.*



## Example 2. Horizontal Slat Wall Display Setup

The following screens will create a typical Horizontal Slat Wall plan. Select a *Display Type* of Horizontal Slat Wall, a *Display Style* of Flat and your choice of background color.



The 'Plan Setup' dialog box is shown with the 'General' tab selected. The 'Database Name' is 'C:\Program Files\Shelf Logic Enterprise Edition\Samples\Dairy.MDB'. Under 'Display Type', 'Horizontal Slatwall' is selected. Under 'Display Style', 'Flat Display' is selected. The 'Background' section shows 'Preset Color' set to 'Gray 1'. On the right, 'Show Ruler' is checked.

Plan Setup

General Dimensions Segments

Database Name: C:\Program Files\Shelf Logic Enterprise Edition\Samples\Dairy.MDB [Browse]

Display Type:

- ☐ Peg or Peg/Shelf
- ☐ Shelf
- ☒ Horizontal Slatwall
- ☐ Vertical Slide
- ☐ Grid Wall

Display Style:

- ☒ Flat Display
- ☐ 4 Way
- ☐ 4 Way with Overlap

Overlap Amount: 0 Inch

Background:

Preset Color: ☒ Gray 1 [Change Color]

Custom Color: ☐ [Change Color]

Use Image: ☐ Image File Name: [Browse]

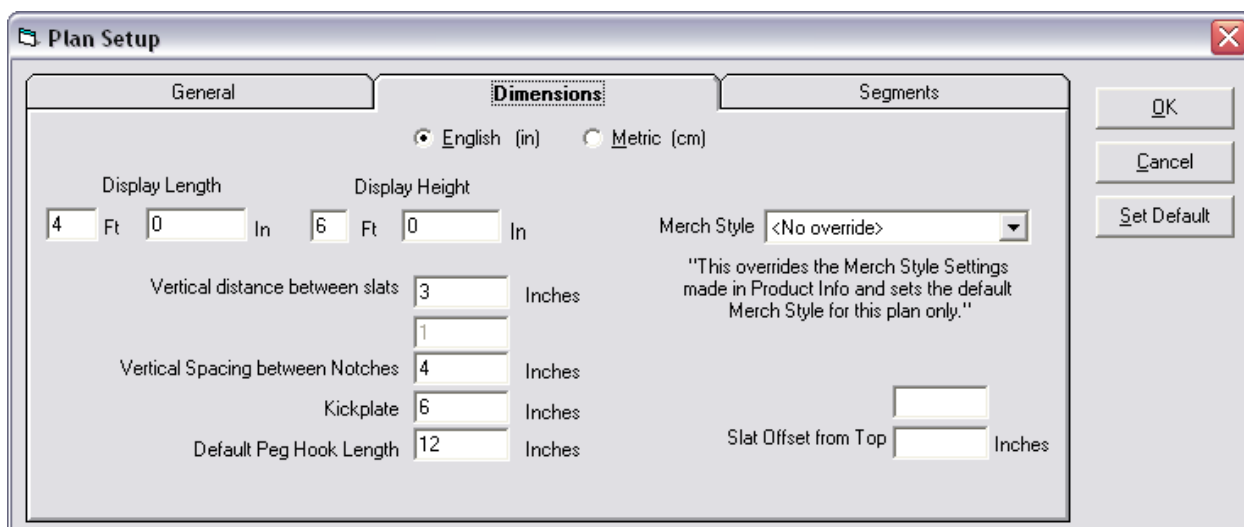
☐ Show Grid

☒ Show Ruler

☐ Measure from Bottom Up

[OK] [Cancel] [Set Default]

Our plan is 4 feet wide and 6 feet high. The distance between horizontal slats is 3 inches and the vertical spacing between notches is 4 inches.



The 'Plan Setup' dialog box is shown with the 'Dimensions' tab selected. The units are set to 'English (in)'. 'Display Length' is 4 Ft 0 In and 'Display Height' is 6 Ft 0 In. 'Vertical distance between slats' is 3 Inches, 'Vertical Spacing between Notches' is 4 Inches, 'Kickplate' is 6 Inches, and 'Default Peg Hook Length' is 12 Inches. 'Merch Style' is '<No override>'. A note states: 'This overrides the Merch Style Settings made in Product Info and sets the default Merch Style for this plan only.'

Plan Setup

General Dimensions Segments

☒ English (in) ☐ Metric (cm)

Display Length: 4 Ft 0 In

Display Height: 6 Ft 0 In

Vertical distance between slats: 3 Inches

Vertical Spacing between Notches: 4 Inches

Kickplate: 6 Inches

Default Peg Hook Length: 12 Inches

Merch Style: <No override>

"This overrides the Merch Style Settings made in Product Info and sets the default Merch Style for this plan only."

Slat Offset from Top: [ ] Inches

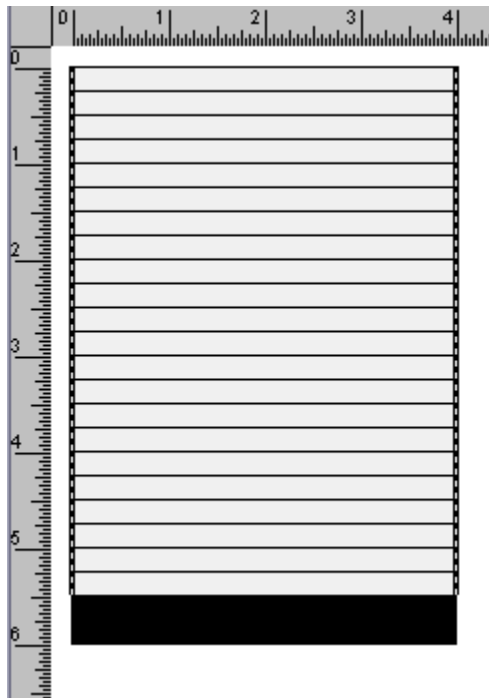
[OK] [Cancel] [Set Default]

There will be only one segment, which is the entire length of 48 inches.

**Plan Setup**

General			Dimensions			Segments		
Segment Spacing						Upright Thickness <input type="text" value="0.00"/> Inches		
1	<input type="text" value="48.00"/>	Inches	11	<input type="text" value="0.00"/>	Inches	21	<input type="text" value="0.00"/>	Inches
2	<input type="text" value="0.00"/>	Inches	12	<input type="text" value="0.00"/>	Inches	22	<input type="text" value="0.00"/>	Inches
3	<input type="text" value="0.00"/>	Inches	13	<input type="text" value="0.00"/>	Inches	23	<input type="text" value="0.00"/>	Inches
4	<input type="text" value="0.00"/>	Inches	14	<input type="text" value="0.00"/>	Inches	24	<input type="text" value="0.00"/>	Inches
5	<input type="text" value="0.00"/>	Inches	15	<input type="text" value="0.00"/>	Inches	25	<input type="text" value="0.00"/>	Inches
6	<input type="text" value="0.00"/>	Inches	16	<input type="text" value="0.00"/>	Inches	26	<input type="text" value="0.00"/>	Inches
7	<input type="text" value="0.00"/>	Inches	17	<input type="text" value="0.00"/>	Inches	27	<input type="text" value="0.00"/>	Inches
8	<input type="text" value="0.00"/>	Inches	18	<input type="text" value="0.00"/>	Inches	28	<input type="text" value="0.00"/>	Inches
9	<input type="text" value="0.00"/>	Inches	19	<input type="text" value="0.00"/>	Inches	29	<input type="text" value="0.00"/>	Inches
10	<input type="text" value="0.00"/>	Inches	20	<input type="text" value="0.00"/>	Inches	30	<input type="text" value="0.00"/>	Inches
						Upright Color <input type="text" value="Black"/> <input type="button" value="Change Color"/>		
						<input type="button" value="User Fields"/>		
						<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Set Default"/>		

When OK is clicked, our display will look like the figure below.



# Shelves

## Adding Shelves to a Display

Hot Button: +Shelf  
Menu: Fixture/Shelf/Add Shelf

After executing one of the above commands, the Add Shelf window will open as shown below. Shelves are always added to the display from the bottom up and can be added individually or in multiples. Shelves should never be longer than the segment length defined in display setup.

**Add Shelf**

Shelf ID

Add  Shelves

Segment Number  ☐ Floating Shelf

Length  Inches

Height  Inches

Depth  Inches

Thickness  Inches

Shelf Angle  Degrees

Distance from Bottom  Inches

Peg Area Height  Inches

Name

Manufacturer

OK  
Cancel  
Color  
Set Default  
Add to Library  
Remove from Library  
User Fields

### Shelf ID

This has a list of all shelf types saved in the library. You can choose one from the list or just define your own shelf. If you want to save a shelf setup to the library, just give it a Shelf ID and it will be saved under that name.

### Add Shelves

Enter the number of shelves to be added to the active segment.

### Segment Number

Defaults to the active segment. The active segment is the last segment in which the mouse was clicked. You can change this segment number if needed

### Floating Shelf.

If this checkbox is checked, then this shelf becomes a floating shelf. It can be of any length and can go anywhere on the plan, while a normal shelf must be between sets of uprights and must be the same width as the segment they're in.

When the Floating Shelf checkbox is clicked, then the "Length" field can be edited. Otherwise the Length field can't be changed.

### **Length**

This is the length of the shelf in inches from left to right. This measurement defaults to the length of the segment as defined in Display Setup and cannot be changed.



**Note:** *If you need to add a shelf that is shorter or longer than the segment length, the floating shelf feature should be used.*

### **Height**

This is the shelf height, or the distance from the top surface of the current shelf to the bottom surface of the shelf above it. It represents the amount of space in which you can place products. This is the area reserved for items and will appear as a shaded area on the screen.



**Note:** *The top shelf of each segment will still have the specified shelf height reserved for items even though there is no shelf above it, as indicated by the shaded area.*

### **Depth**

The depth of the shelf in inches as measured from the front edge of the shelf to the back edge.

### **Thickness**

The thickness of the shelf in inches. This measurement should be made at the thickest point of the shelf.

### **Shelf Angle**

This is the angle of the shelf. A normal flat shelf is at an angle of 0. As the shelf is tilted downwards, the angle increases. At 90 degrees, the shelf is pointing downwards.

### **Distance from Bottom**

This is a way to place the shelf in any desired position. Just specify the number of inches (or cm) and the shelf will be placed that distance from the bottom of the display, just above the kickplate.

### **Peg Area Height**

Above each shelf area can be an area set aside for peg items. This field lets you specify the height of this peg area in inches (or cm). This area is always the same length as the shelf. The Peg Area goes between the shelf area and the shelf above it. If the shelf height is 12 inches and the peg area height is 6 inches, then the distance to the next shelf above is 18 inches.

### **OK Button**

Accepts the shelf dimensions, closes the Add Shelf dialogue box, and adds the shelf or shelves to the display in the Plan Window.

### **Add to Library Button**

This lets you add the shelf to the Shelf Library. You must have a Shelf ID entered in order to add shelves to the Shelf Library.

### **Remove from Library**

This lets you remove this shelf from the Shelf Library.

### **User Fields**

This lets you enter user fields for this shelf.

**Cancel Button**

Closes the Add Shelf dialogue box without adding shelves.

**Color**

Clicking on the “Color” button lets you choose the color of the shelf or shelves being added, or changed if you are changing an existing shelf. This displays the “Color Selector” Window, which is displayed below, where you can choose a shelf fill color, outline color and pattern.

**Fill Color**

The shelf’s current fill color is displayed. The “Change Color” button will let you change this fill color. When the color is changed, you can see what the shelf color and pattern looks like in the sample to the right.

**Outline Color**

The shelf’s current outline color is displayed. The “Change Color” button will let you change this outline color. When the color is changed, you can see what the shelf color and pattern looks like in the sample to the right.

**Pattern**

You have a choice of 7 different patterns for the shelf. Click on the option button below the pattern you wish to choose. You will see this pattern in the sample picture to the right.

**Default**

Saves the current shelf dimensions as the default shelf setup.

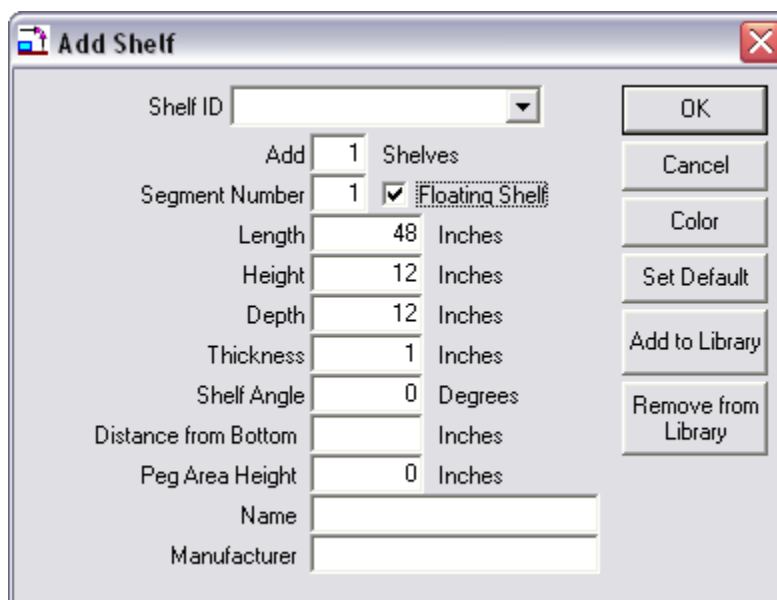
The defined shelves should now appear on the display and are colored blue. To select a specific shelf, place the mouse pointer over the shelf and click the left mouse button. The selected shelf turns red.

The shaded area above the shelf is a visual aid for determining the space occupied by each shelf. Even though you will not see the pegboard background in this reserved area on your screen, you can still place peg hook items in the reserved area. When a peg item is placed with its bottom edge on a shelf, the item automatically becomes a shelf item as indicated on the Status Bar.

## Floating Shelves

A floating shelf is attached directly to pegboard or slat wall instead of to vertical uprights, and can be used to simulate many different pegboard or slat wall accessories. Floating shelves can be used with any display type and can be dragged to any position within the display.

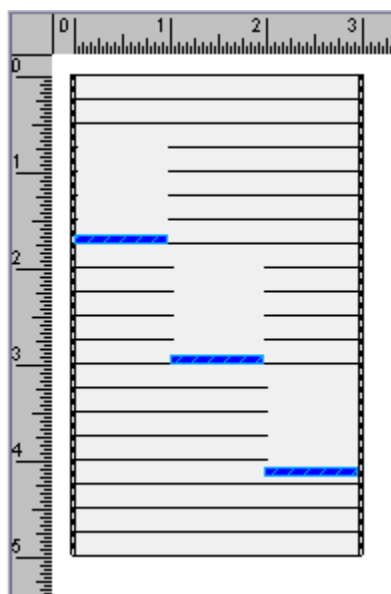
The procedure for adding a floating shelf is identical to adding a regular shelf, except that the “Floating Shelf” Checkbox is checked.. A floating shelf can be any length since it does not attach to uprights.



The "Add Shelf" dialog box contains the following fields and controls:

- Shelf ID: A dropdown menu.
- Add: A numeric input field with the value 1.
- Shelves: A label next to the Add field.
- Segment Number: A numeric input field with the value 1.
- Floating Shelf: A checked checkbox.
- Length: A numeric input field with the value 48, followed by the unit "Inches".
- Height: A numeric input field with the value 12, followed by the unit "Inches".
- Depth: A numeric input field with the value 12, followed by the unit "Inches".
- Thickness: A numeric input field with the value 1, followed by the unit "Inches".
- Shelf Angle: A numeric input field with the value 0, followed by the unit "Degrees".
- Distance from Bottom: A numeric input field, followed by the unit "Inches".
- Peg Area Height: A numeric input field with the value 0, followed by the unit "Inches".
- Name: A text input field.
- Manufacturer: A text input field.
- Buttons on the right: OK, Cancel, Color, Set Default, Add to Library, and Remove from Library.

When the OK button is clicked, the shelf appears in the upper left of the plan and you can drag it into place. A floating shelf can go anywhere on the plan and into any segment on the plan.



Here's an example of three floating shelves in a horizontal slat display.

## Locking Shelves

Menu: Shelf/Lock Shelves

After building your shelving display, this feature locks the shelves in place and prevents you from accidentally moving a shelf along with an item or group of items when experimenting with different arrangements. If you select items and a locked shelf, neither will move if dragged. Items must be selected without selecting a locked shelf.

## Show Shelf Numbers

Menu: View/Show Shelf Numbers

Selecting this option turns the display of shelf number tags on and off and is particularly useful when working with Smart Plan for Shelves.



**Note:** *If you have rearranged the shelf positions it is possible that the shelf numbers will not be in consecutive order on your planogram.*

## Moving to the Next/Previous Shelf

Menu: Item/Next Previous Item/Shelf

Keyboard: < or > or , or . key

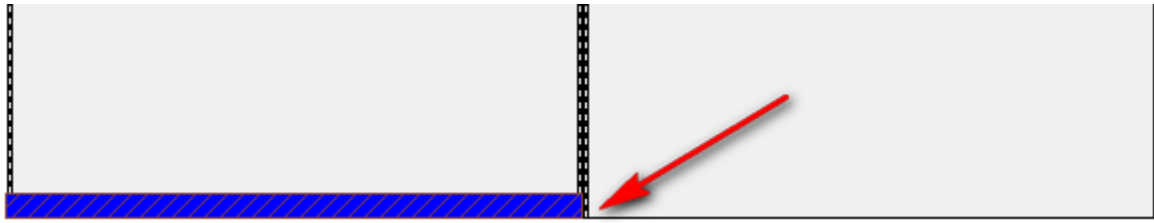
You can use the “<” and “>” keys too move to the next and previous shelf. A single shelf must be selected before pressing the “<” or “>” keys.

The “<” key is also the “,” (comma) key and either can be used to move the selection to the previous shelf

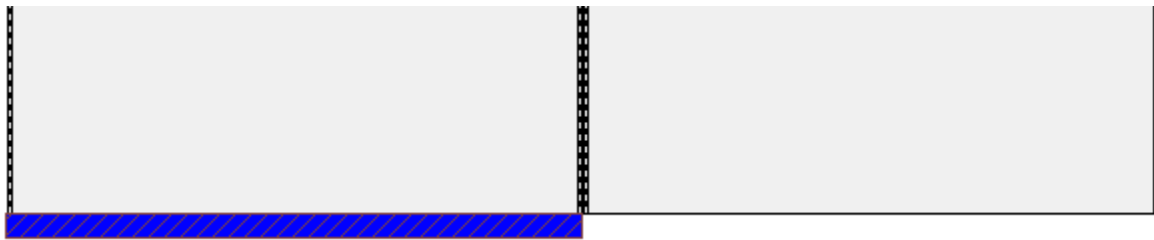
The “>” key is also the “.” (period) key and either can be used to move the selection to the next shelf.

## How Shelves are Placed on the Plan

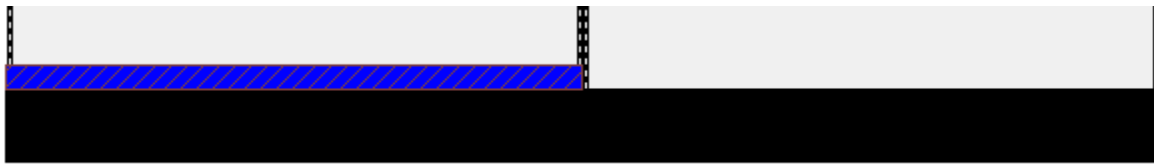
When first adding shelves to a segment, the shelves are placed from the bottom up. The first shelf is placed so the shelf bottom is level with the bottom of the display, as shown in the figure below.



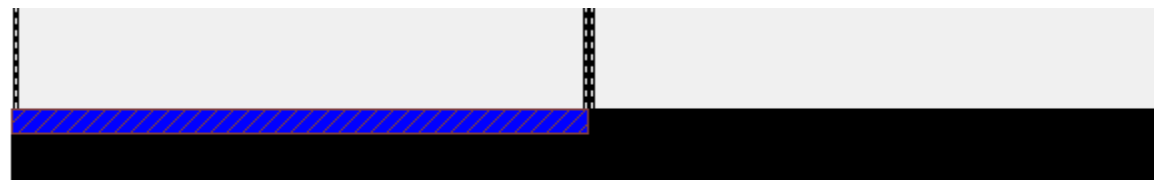
If there are products placed directly onto the floor, you still must create a shelf to use as the floor. You can place the shelf below the display so it appears as the floor, as shown below.



If a kickplate is in use, then the bottom shelf will go above the kickplate area, as shown below.



If the top of the kickplate is used as the bottom shelf, then drag the shelf downwards so that the top of the shelf is level with the top of the kickplate area, as shown below.



From the first shelf, the shelf height extends upwards and if there's a peg area height specified, then that extends upwards after the shelf height. After that comes the second shelf.

For example, the shelf height of the first shelf is 12 inches and the peg area height is 6 inches. So there's a total of 18 inches in between the shelves. The bottom of the second shelf starts at 18 inches up, and if this second shelf thickness is an inch, then the top of the second shelf is 19 inches above the top of the first shelf.

If you specify a "Distance from the bottom", then the shelf will start at this location, regardless of shelf heights and peg area heights.



## Moving Shelves

This is where the “logic” in Shelf Logic comes in. The shelves act in very specific ways to help you in moving them around the display, and lend themselves to trying different display scenarios. Much of this behavior is controlled by the Smart Shelf feature.

When Smart Shelf is turned off, then after the shelves are moved, the shelves remain in place but their shelf height and peg area height are adjusted to fit the newly placed shelves.

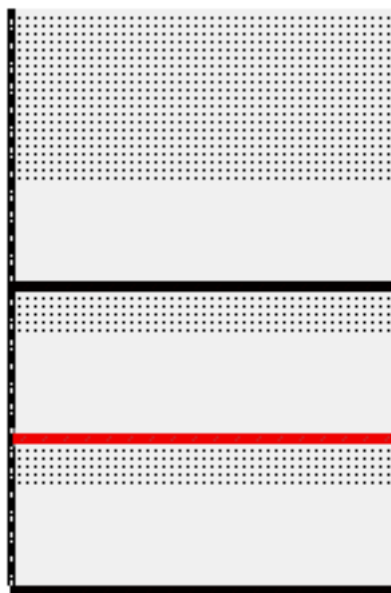
With Smart Shelf turned on, then after the shelves are moved, the position of the shelves above the moved shelves are moved up or down so the shelf height and peg area height remain the same.

If there isn't enough room for the changes requested, in other words, not enough room at the top to push shelves upwards, you will get an error message and the move will be undone.

Some examples will make this clearer.

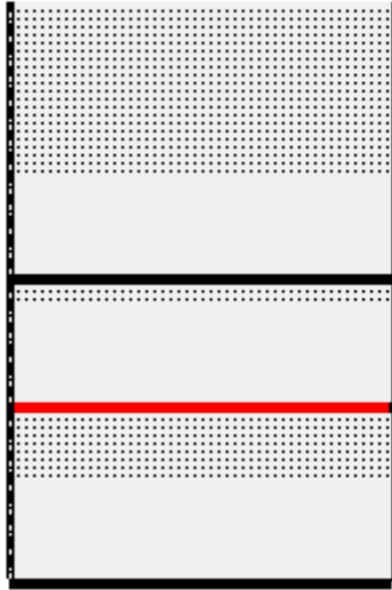
### ***Moving Shelves Up in the Same Segment – Smart Shelf Off***

With Smart Shelf off, a moved shelf will stay where placed and its shelf height and peg area adjusted according to the location of the shelf above. Let's look at an example of this.



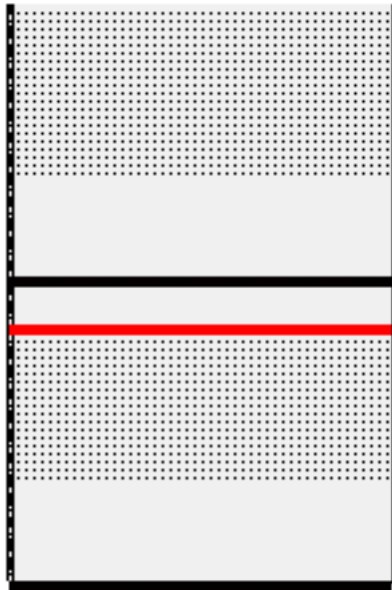
**Figure 10. Before Moving a Shelf – Smart Shelf Off**

In the figure above, we have three shelves, each with a shelf height of 12 inches and a peg area height of 6 inches. The middle shelf is selected and will be moved upwards, as shown in the next figure.



**Figure 11. Moving the Shelf Upwards – Smart Shelf Off**

The shelf has been moved upwards slightly. Since Smart Shelf is off, the moved shelf's height and peg area are not preserved. As the shelf is moved upwards, first the peg area height is reduced and when there's no more peg area, then the shelf height is reduced, as shown in the next figure.



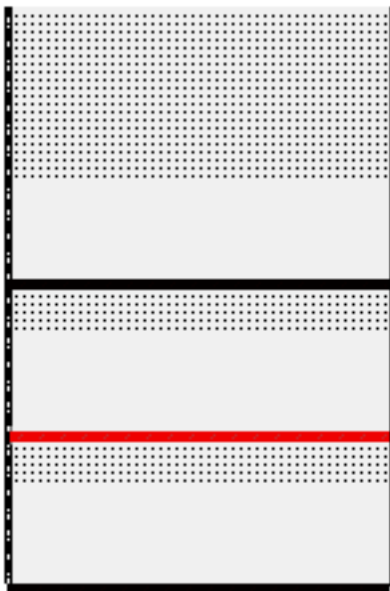
**Figure 12. Moving the Shelf Up More – Smart Shelf Off**

Here, the middle shelf has been moved up even more, and since there's no more peg area, then the shelf height of the moved shelf is reduced.

If there was never a peg area height specified, then only the shelf height is reduced as the shelf is moved upwards.

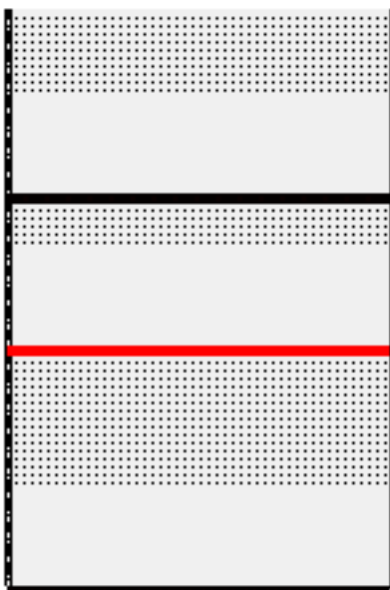
### ***Moving Shelves Up in the Same Segment – Smart Shelf On***

With Smart Shelf on, a shelf stays where placed, but the shelves above this shelf are pushed upwards so the shelf height and peg area of the moved shelf remains unchanged. In other words, as the shelf is moved, the other shelves move out of its way. Let's look at an example.



**Figure 13. Before Moving a Shelf Upwards – Smart Shelf On**

Here are three shelves before the move. The middle shelf is selected and will be moved upwards. Since Smart Shelf is on, the shelf above the selected shelf will move upwards along with the selected shelf, as shown in the next figure.

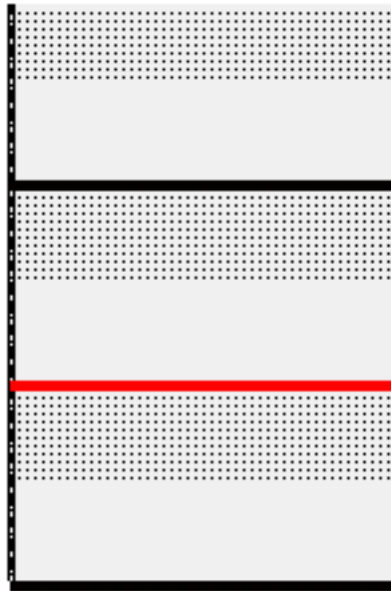


**Figure 14. After the Shelf Move – Smart Shelf On**

In the figure above, you can see that the middle shelf is moved upwards and the shelf above it is also moved the same amount, so that the shelf height of the moved shelf remains at 12 inches and the peg area height of the moved shelf remains at 6 inches.

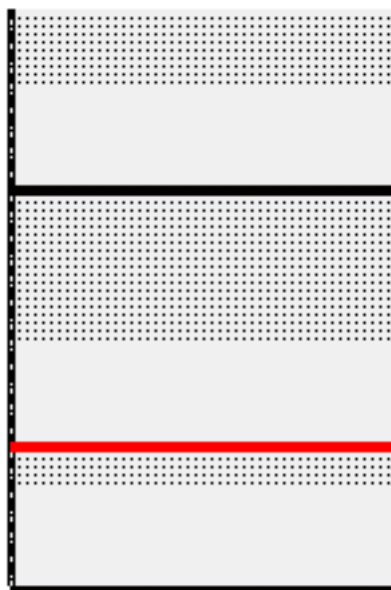
### ***Moving Shelves Down in the Same Segment – Smart Shelf Off***

When moving a shelf downwards with Smart Shelf off, then the shelf height and peg area of the moved shelf increases and the shelf height and peg area of the shelf below is reduced. Let's look at an example.



**Figure 15. Before Moving a Shelf Down – Smart Shelf Off**

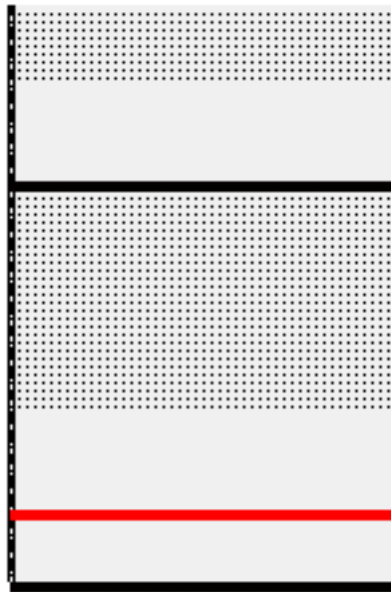
Here are three shelves before the move. The middle shelf is selected and will be moved downwards. Since Smart Shelf is off, then the shelf heights are adjusted to fit the new shelf locations.



**Figure 16. Moving the Shelf Downwards – Smart Shelf Off**

As the middle shelf is moved down, its shelf height remains the same but the peg area is increased. If there's no peg area, then the shelf height is increased.

Below the moved shelf, the peg area is reduced for the shelf below. As the shelf is moved down, first the peg area is reduced, and when there's no more peg area, then the shelf height is reduced, as shown in the figure below.

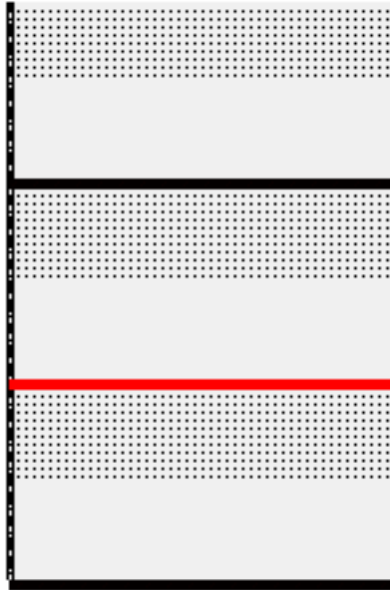


**Figure 17. The Shelf is Moved Down More - Smart Shelf Off**

In the above figure, the shelf is moved down enough so that the shelf height of the shelf below is reduced.

### ***Moving Shelves Down in the Same Segment – Smart Shelf Off***

When Smart Shelf is on, then as shelves are moved downwards, the position of the shelves above are changed to fit the existing shelf heights and peg areas. Here's an example:



**Figure 18. Before Moving a Shelf – Smart Shelf On**

Here are three shelves, with the middle one selected for the move. When the shelf is moved down, the top shelf is also moved down, so that the shelf height and peg area height of the selected shelf remains the same.



**Figure 19. After Moving a Shelf – Smart Shelf On**

The shelf height and peg area of the moved shelf remains the same as before the move. The shelf height and peg area of the shelf below are reduced. The top shelf is moved downwards the same distance as the selected shelf, keeping the shelf height and peg area height of the selected shelf constant.

## Overlapping Shelves

You can drag a shelf past another shelf. With Smart Shelf off, the shelf heights are adjusted, with Smart Shelf on, the shelf positions are adjusted.

You can insert a shelf in between two other shelves. The shelves above will move up and make room for the selected shelf and any items you might have on that shelf.

## Moving Shelves Left and Right

You can move shelves to other segments of the plan. It is suggested that you turn Smart Shelf on when doing this so that any shelves in the way are adjust to make room for the moved shelf and items on that shelf.

With Smart Shelf off, the moved shelf will have its shelf height and peg area adjusted after being moved to the new segment, depending on the positions of the shelves already placed in that segment.

## Editing Shelves

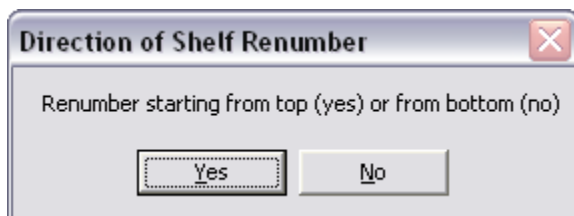
Just double-click on a shelf and you can change shelf properties like shelf depth or height. Or you can click on a shelf to select it and use the menu (Fixture – Shelf – Change Shelf) to change properties.

## Deleting Shelves

You can delete one or more shelves by selecting them and pressing the DELETE key. You can undo the delete if you make a mistake.

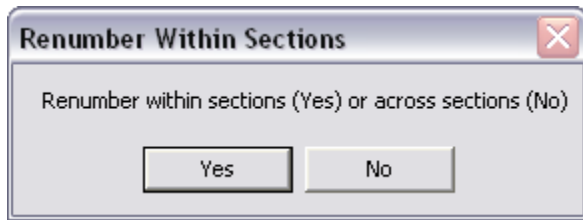
## Renumbering Shelves

Shelves are numbered as they are added to the plan. They can be renumbered after being added to the plan. From the Fixture Menu, select “Shelves”, then choose “Renumber Shelves”. You will see the following window.



This asks you if you want to renumber the shelves from top down (answer “Yes”) or bottom up (answer “No”).

After this, the following window is displayed.



This asks if you want to renumber shelves within each segment or across the entire display. If you answer “Yes” to renumber within segments, the shelves are numbered starting at the first segment, then moving to the second segment and so on.

## **Determining the Weight of Products on a Shelf**

You can select a shelf and determine the weight of all of the product on that shelf. From the Fixture Menu, select “Shelves” and then chose “Weight of All Products on Shelf”.

## **Mirroring Faces on a Shelf**

You can reverse or mirror the product faces on a selected shelf. First select the desired shelf, then from the Fixture Menu, select “Shelves” and then choose “Mirror Faces on Shelf”. The product faces on that shelf will be reversed in their order on the shelf.

Note: You can mirror the entire plan from the Face Menu, “Mirror Plan”.

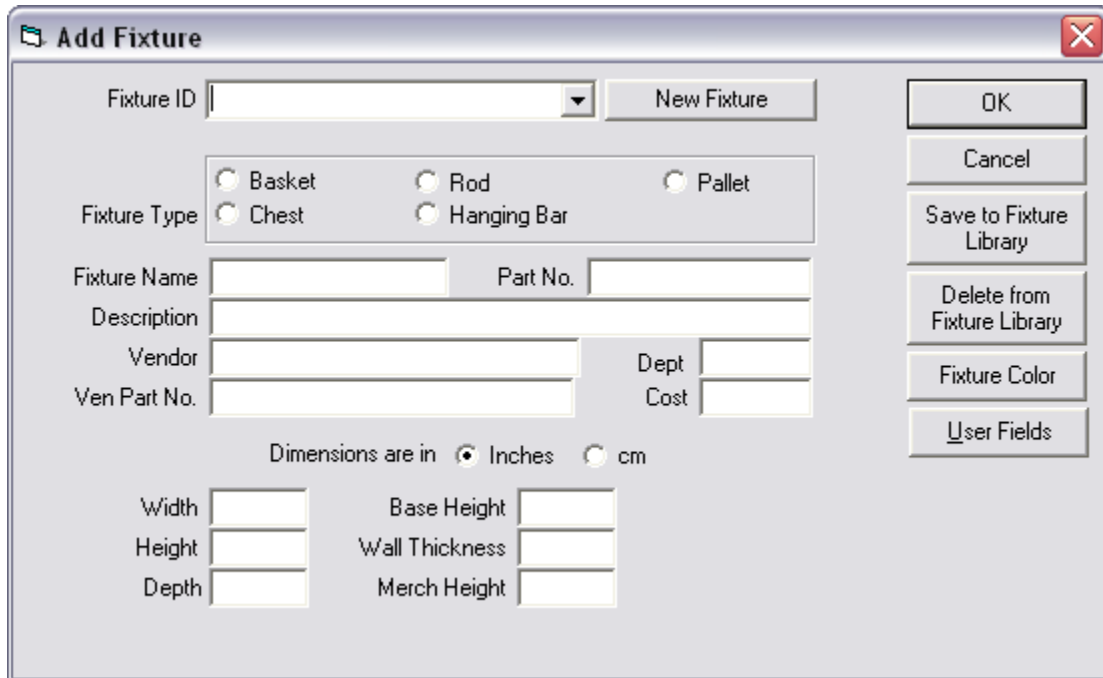


# Fixtures

There are several kinds of fixtures supported for your plans. They are pallets, baskets, rods, hanging bars and chests available. Basically a fixture is a form of shelf. Products can be put into fixtures similar to the way they are placed on shelves.

## Adding Fixtures to your Plan

From the Fixture Menu, select “Fixtures”. You will see the *Fixture Window*, as shown in the figure below.



### Fixture ID (optional)

This is an optional field and is used to identify the fixture if you will save this fixture to the Fixture Library. You can enter a new Fixture ID to create a new fixture or select a fixture from the list of fixtures in the Fixture ID pulldown.

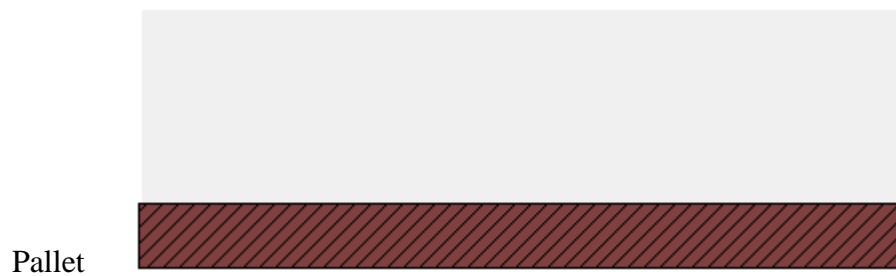
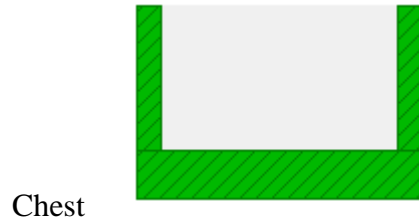
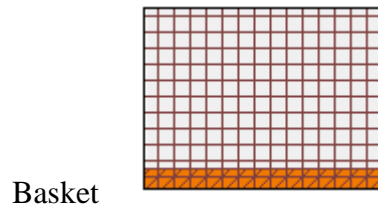
You don't need to enter a Fixture ID to create a new fixture. Enter it only if you want to save to fixture to the Fixture Library.

### New Fixture

Click on the New Fixture button to clear any information on the screen and create a new fixture.

## Fixture Type

This lets you select a fixture type. You can choose:



## Fixture Name (optional)

This is the name of the fixture.

## Part No. (optional)

This is the part number used to identify this fixture.

## Description (optional)

This is the description of the fixture.

**Vendor (optional)**

This is the company that supplies the fixture.

**Ven Part No. (optional)**

This is the Vendor's part number of the fixture.

**Dept (optional)**

This is the department using this fixture.

**Cost (optional)**

This is the cost of the fixture.

**Dimensions are in**

Choose the units of measurements for the fixture.

**Width**

This is the width, in inches or cm of the fixture.

**Height (except Rod)**

This is the height, in inches or cm of the fixture. For the pallet, it represents the space reserved above the pallet for products.

**Depth**

This is the depth, in inches or cm of the fixture.

**Base Height (except Rod and Hanging Bar)**

This is the thickness of the bottom of the fixture. If this is too small, less than an inch, it will be hard to select and drag the fixture on the plan.

**Wall Thickness (For Basket and Chest)**

This is the wall thickness of the sides of the chest or basket.

**Merch Height (except Rod and Hanging Bar)**

This is the maximum height of the products within a fixture. This is used with the "Fill Fixture with Product" command. It determines how high the products can be stacked vertically.

Below are the specifications for a basket. It is 5 inches wide and 8 inches high with a depth of 6 inches.

**Add Fixture**

Fixture ID: 5'x 6' Basket [New Fixture]

Fixture Type: ☒ Basket ☐ Rod ☐ Pallet  
☐ Chest ☐ Hanging Bar

Fixture Name: [ ] Part No.: [ ]

Description: [ ]

Vendor: [ ] Dept: 0

Ven Part No.: [ ] Cost: 0

Dimensions are in: ☒ Inches ☐ cm

Width: 5 Base Height: 1

Height: 8 Wall Thickness: 0.125

Depth: 6 Merch Height: 7.5

Buttons: OK, Cancel, Save to Fixture Library, Delete from Fixture Library, Fixture Color, User Fields

The Wall Thickness is 1/8 inch and the Merchandising Height is 7.5 inches. So when filled with product, the products will only go up to 7 inches high.

When fixtures are added to the plan, they are placed into the upper right corner of the plan. Since product are displayed on top of fixtures, if there are products filling the upper left corner of the plan, the fixture won't be seen. It is recommended that you add fixtures before adding products to your plan.

## Saving Fixtures to the Fixture Library

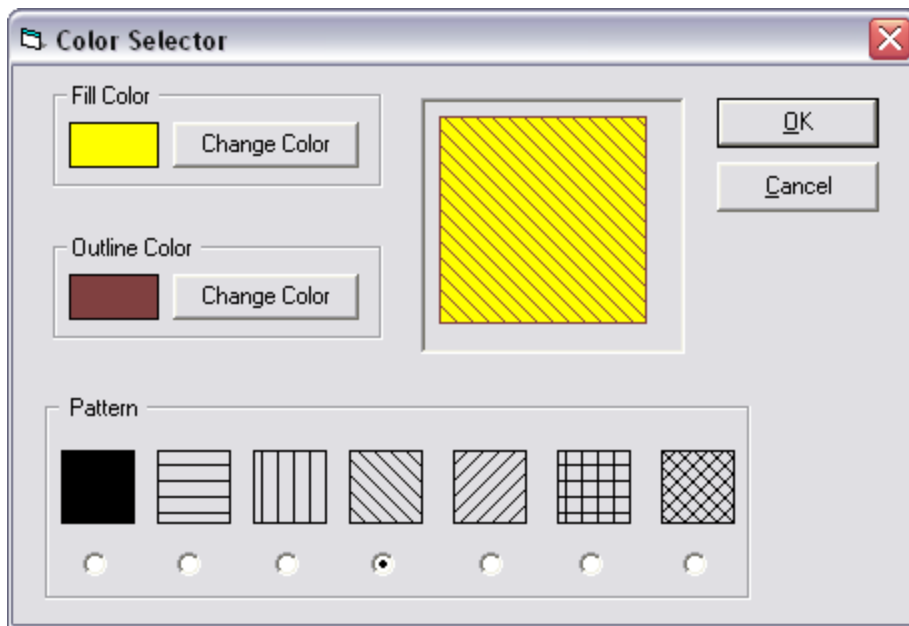
Once you've entered the specifications for a fixture, you can save it to the *Fixture Library* by clicking on the "Save to Fixture Library" button. Once saved it will appear in the Fixture ID pulldown so it can be selected the next time a fixture is added.

## Delete a Fixture from the Fixture Library

A fixture can be deleted from the Fixture Library by selecting it so it appears in the Fixture Window, then clicking on the "Delete from Fixture Library" button. It will no longer appear in the Fixture ID pulldown.

## Fixture Color

Clicking on the *Fixture Color* button lets you change the color and pattern of the fixture. When you click the Fixture Color, you will see the following window:



You can choose the fill color, the outline color and the pattern of the fixture. This is the same as when choosing a color for a product.

## Moving Fixtures

Just as with product and shelves, click on a fixture to select it. It can then be moved. You must click on the bottom of the fixture, it will select the base height of the fixture (unless a rod or hanging bar) and move it into place. Only the base height 'shelf' moves. When it is unselected, the entire fixture will be seen.

With Rods and Hanging Bars, click on either and move into place.

## Adding Products into Fixtures

Adding a product to a pallet, chest or basket fixture is just like adding a product to a shelf. If Auto Formatting is used, the products will be formatted within the fixture.

When adding products to a Rod or Hanging Bar, the product is added underneath the fixture as opposed to the Pallet, Chest or Basket where the product is added on top of the fixture.

## *Filling a Fixture with Products*

On the Fixtures Menu, there's a selection called "Fill Fixture with Products". Place a product on the bottom left of the fixture and select it. Choose the "Fill Fixture with Products" command and it will fill the fixture as high as the merchandising height will allow.

## **Changing Fixtures**

A fixture can be changed by double-clicking on it. The Fixture Window appears with the information filled in and you can change any property.

## **Deleting Fixtures**

A fixture can be deleted by clicking on it to select it, then pressing the DELETE key.

# Background Fixtures

Background Fixtures let you add areas of gridwall, pegboard, horizontal slatwall or vertical slide wall to a plan. The Background Fixtures can be of any size and can be mixed so a single plan have have peg areas, gridwall areas, etc together. In addition, background fixtures can be colored to better identify them.

## Adding Background Fixtures

From the Fixtures Menu, select “Background Fixture”, then “Add Background Fixture”. You will see the Background Fixtures Window, as shown in the figure below.

**Add Background Fixture**

Fixture ID: [Dropdown] New Fixture

Fixture Name: [Text Field]

Fixture Color: [Black Swatch] Change Color

OK Cancel

Save to Fixture Library

Delete from Fixture Library

**FixtureType**

☐ Peg ☐ Horizontal Slat wall

☐ Vertical Slide ☐ Grid Wall

**Fixture Spacing**

Horizontal Spacing: [Text Field] Inches

Vertical Spacing: [Text Field] Inches

**Fixture Location**

Position from Display Left: [Text Field] Inches

Position from Display Top: [Text Field] Inches

**Fixture Dimensions**

Fixture Width: [Text Field] Inches

Fixture Height: [Text Field] Inches

### Fixture ID (optional)

This is an optional field and is used to identify the fixture if you will save this fixture to the Fixture Library. You can enter a new Fixture ID to create a new fixture or select a fixture from the list of fixtures in the Fixture ID pulldown.

You don't need to enter a Fixture ID to create a new fixture. Enter it only if you want to save to fixture to the Fixture Library.

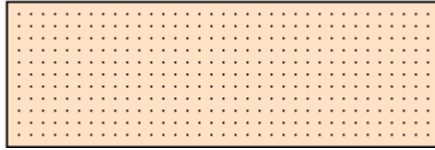
### New Fixture

Click on the New Fixture button to clear any information on the screen and create a new fixture.

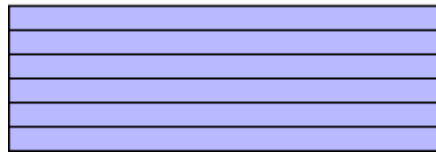
## ***Fixture Type***

This lets you select a fixture type. You can choose:

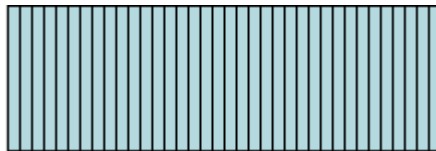
Pegboard



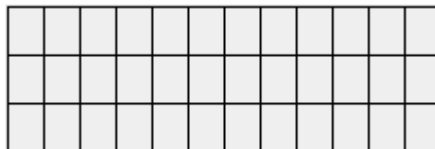
Horizontal Slatwall



Vertical Slide



Gridwall



## ***Fixture Spacing***

### **Horizontal Spacing (except Horizontal Slatwall)**

This is the horizontal spacing between pegholes or slats. It's measured in inches or cm.

### **Vertical Spacing (except Vertical Slide)**

This is the vertical spacing between pegholes or slats. It's measured in inches or cm.



### ***Fixture Location***

This determines the initial position of the Background Fixture. It can be moved or repositioned after being added to the plan.

#### **Position from Display Left**

This is the distance from the left edge of the plan to the start of the Background Fixture, in inches or cm.

#### **Position from Display Top**

This is the distance from the top of the plan to the top of the Background Fixture, in inches or cm.

### ***Fixture Dimensions***

#### **Fixture Width**

This is the width of the Background Fixture, in inches or cm.

#### **Fixture Height**

This is the height of the Background Fixture, in inches or cm.

### ***Fixture Color***

Clicking on the “Change Color” button will let you change the color of the Background Fixture.

## Changing Background Fixtures

You can change any of the Background Fixture properties by double-clicking on the Background Fixture. The same window used to add the Background Fixture is also used to change it.

## Saving Background Fixtures to the Fixture Library

Once you've entered the specifications for a fixture, you can save it to the *Fixture Library* by clicking on the "Save to Fixture Library" button. Once saved it will appear in the Fixture ID pulldown so it can be selected the next time a fixture is added.

## Delete a Background Fixture from the Fixture Library

A fixture can be deleted from the Fixture Library by selecting it so it appears in the Fixture Window, then clicking on the "Delete from Fixture Library" button. It will no longer appear in the Fixture ID pulldown.

## Moving Background Fixtures

You can click on a Background Fixture and drag it with the mouse, or double-click on a Background Fixture to bring up its properties and change the top and left measurements.

## Selecting Product Faces within a Background Fixture

If you want to select multiple product faces that fall within a Background Fixture, hold down the CONTROL key while dragging a select box around the desired faces.

# Adding Products to Your Plan

Shelf Logic Enterprise Edition provides many ways to quickly and accurately place products onto your planogram. You can place products one by one by dragging them from selection lists, you can fill up a shelf by just double-clicking on the product list, you can cut and paste products between plans, or you can use two automated building methods, one that works from the top down, the other from the bottom up.

## Overview

When an item is added to a plan, it represents a facing, which could consist of several items. Usually, the *Auto Stack* feature is on, which will stack as many items in a facing as will fit. The item depth and shelf depth (or peg hook length) are used to calculate the maximum number of items that will fit in a facing. This number can be manually changed for individual facings.

You can put two or more different items (with different UPC codes) in a single facing. The available shelf or peg hook space is evenly divided between the different items. This can be manually changed if desired.

### ***Deleting Products from the Plan***

To delete one or more faces from the plan, select them and press the DELETE key. These product faces are deleted from the plan only, not from the database.

## Summary of Methods for Adding Products

### **1. Drag and Drop from Item Selector Windows**

An item can be added by clicking on the desired item in the Product or Picture Selector Windows and dragging it onto the plan to the desired location.

### **2. Double-Click in Selector Windows**

If you double-click on the desired item in the Product or Picture Selector Window, the chosen item will appear in the upper left corner of the plan. You can then drag it to the desired location.

#### **Next Location Feature**

If the Next Location Feature is turned on, then items chosen with a double-click are placed onto the *active shelf* instead of the upper right corner of the plan. More on this follows later.

### **3. Drag Products from Another Plan Window**

You can drag shelves and product between opened plan windows.

### **4. Cut & Paste**

You can cut and paste shelves and products between plans, whether or not they are currently opened.

### **5. Duplicating Products**

Products can be duplicated, thereby adding more products to your plan.

### **6. Rapid Item Placement (RIP)**

This feature works with a list of UPC codes and can fill an entire shelf or peg area with product with one mouse click. It can also use this list of UPC Codes to build the entire plan from top down. This designed for companies that physically build the actual plan, then scan in the UPC codes so that Shelf Logic can create the same plan as the real life one.

# 1. Adding Products Using the Product Selector Windows

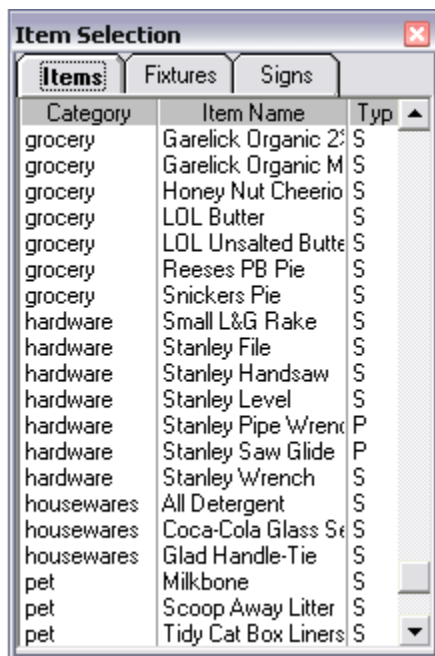
There are two windows that display the products in the database and let you drag and drop them onto your plan. One is the *Product List Selector* and it displays the database as a list. The other is the *Product Picture Selector* and it displays photo images of the products to allow easier selection of product. For the Product List Selector Window, you click on a product on the list and drag it onto your plan. For the Product Picture Selector Window, you click on a product picture and drag it onto your plan. Both or either can be turned on and off from the menu or the Toolbar.

## Product List Selector Window

The Product List Selector Window displays the products in your database and lets you select them for placement onto the plan. Just click on a product and drag it onto the plan.

**IMPORTANT NOTE:** If you have multiple plan windows opened, the Window **MUST** be touching the window into which you will drag the items. You can't drag product from The Product List Selector Window across other opened plans and into the desired plan.

The Product List Selector Window is displayed below.

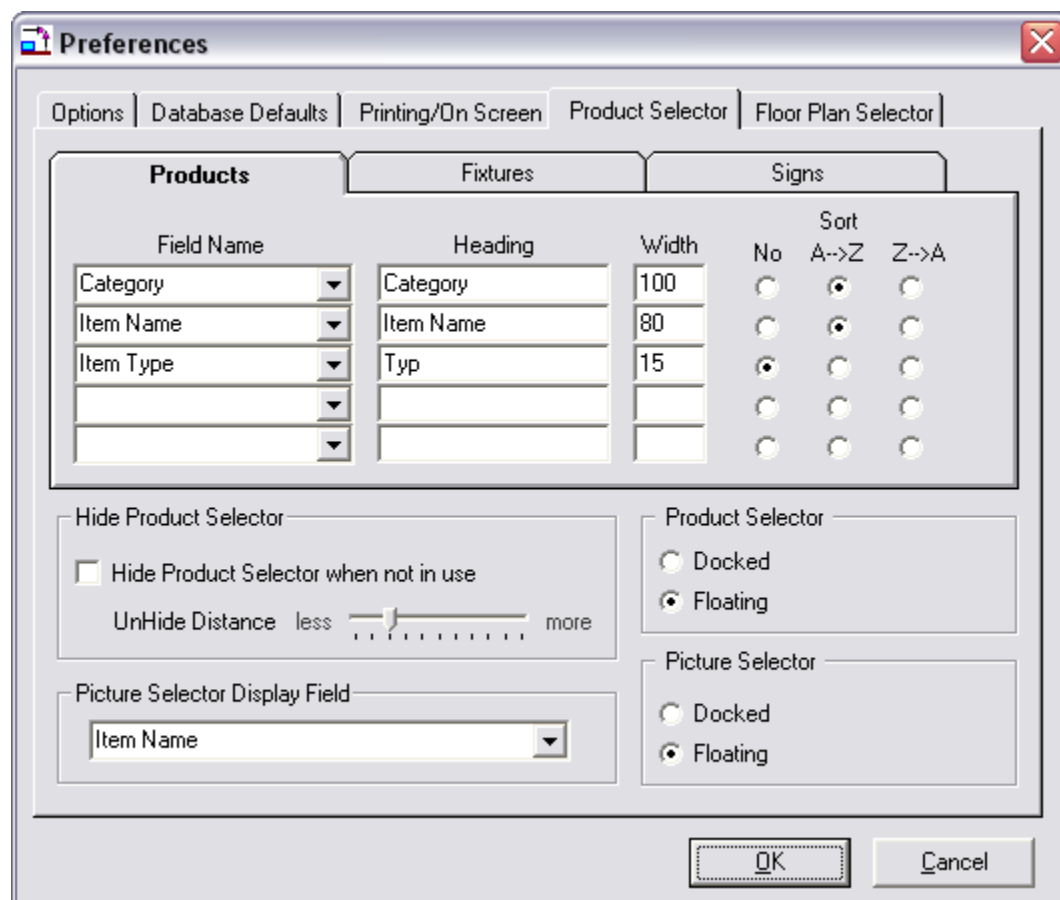


There are three tabs in the Product List Selector Window. One for a list of items in the database, another lists the fixtures in the Fixtures Library and the third lists the sign type items in the database.

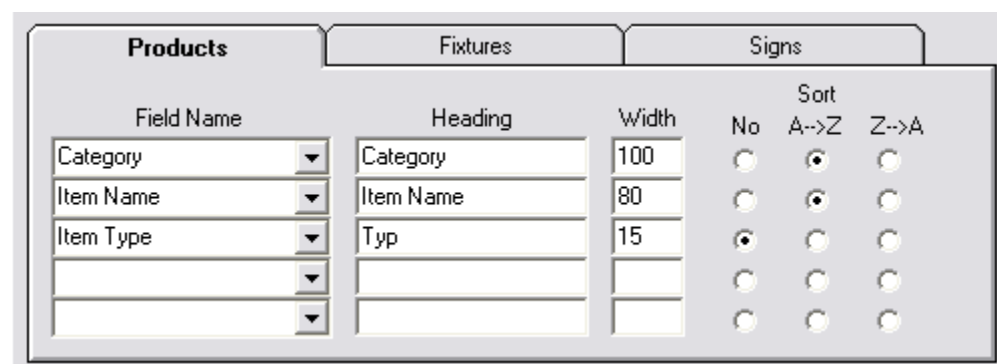
Within each of the three tabs, you can choose up to 5 fields to display, and you can sort ascending or descending on any or all of them. In the above Product List Selector Window, we first display and sort by the Category field. Then the Item name field is displayed and sorted as well, so that within each category, the products are sorted by the Item Name. Finally the Item Type field is displayed. You can choose the title that appears above each column. Notice it says "Typ" instead of the field name of "Item Type".

## Changing Display Fields

In order to change the fields displayed in the Product List Selector Window, you can right click on the window and a menu will appear. Select “Change Display Fields”, Or you can select “Preferences” from the View Menu. From Preferences, choose the “Product Selector” tab.



The screen above lets you select fields to display in the Product Selector. Let’s look at this part of the screen, shown below:



There are three tabs so you can define up to 5 separate display fields for Product, Fixtures and Signage. Each tab looks the same.

## Field Name

Select the field you want to display from the list of possible fields.

## Heading

Enter a heading that will appear as a column heading in the Product List Selector Window.

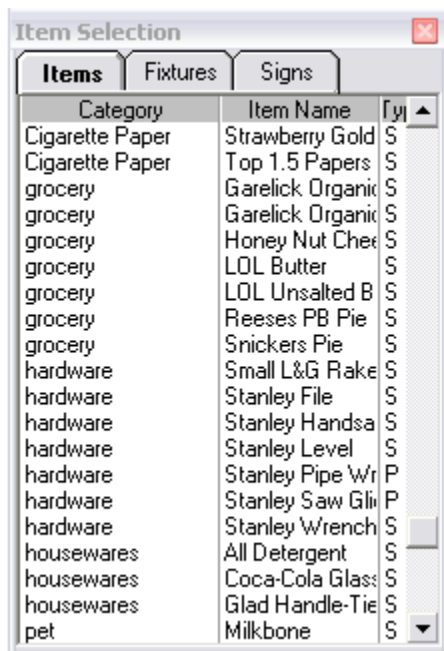
## Width

This is the width, in pixels, of the displayed field value.

## Sort

This lets you sort the field ascending (A->Z) or descending (Z->A) or have no sort at all.

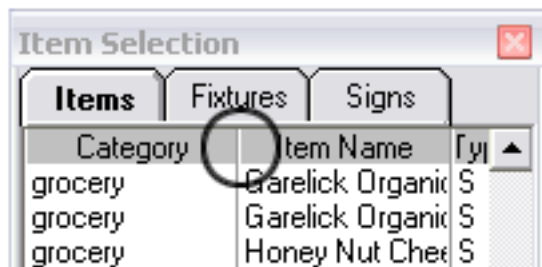
Clicking OK saves this information and the Product List Selector Window looks like the figure below.



## Changing Display Field Widths

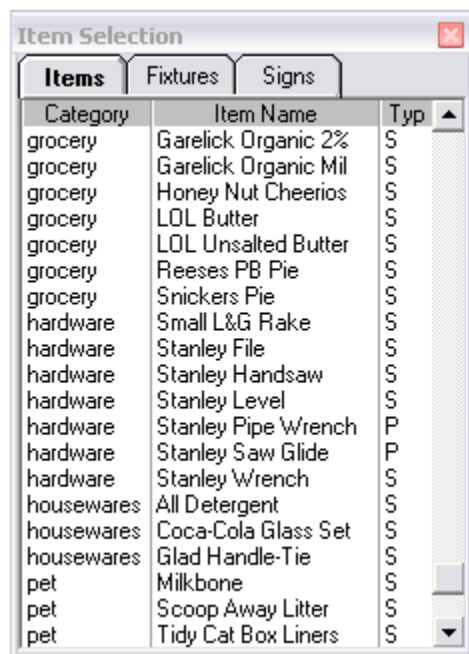
In the figure above, we gave the Category field a width of 100 and the Item Name a width of 80. We can see that this is too wide for Category and too narrow for Item Name. While we can go back into preferences and enter new widths for the columns. But it's easier and better to change it on-the-fly right in the Product List Selector Window.

To fix this, just place the mouse cursor over the divider between the Category column heading and the Item Name column heading, as shown below.



When the mouse is over the dividing line, the cursor changes and you can move this left to right to decrease or increase the field width. We will also put the mouse over the dividing line between Item Name and Typ and move that to the right, thereby widening the field. Finally, we'll put the cursor after the "Typ" field and widen it, too.

When done, the Product List Selector Window will look like the figure below.



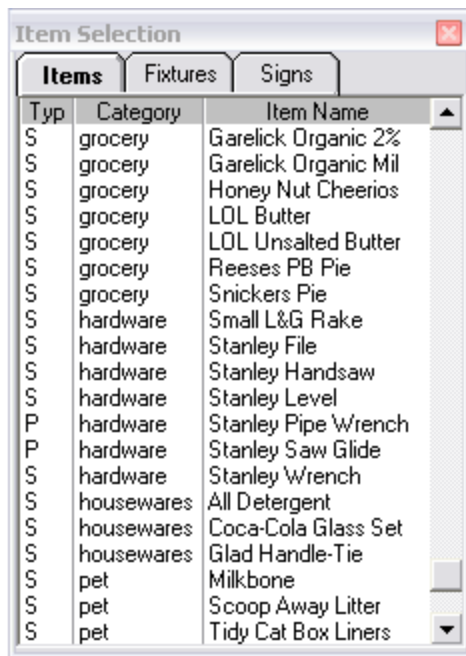
You'll notice that each time you adjust the field widths, the Product List Selector Window will automatically adjust it's width to fit the display field widths. Before increasing field widths, you may need to widen the Product List Selector Window first.

## Changing Display Field Order

The order of the displayed fields can be changed, either by doing it in Preferences or changing it on-the-fly. To do this, just place the mouse cursor over the desired column heading. You'll see the mouse cursor change to a hand. Click and the column will be outlined. You can then drag the column into the new location.

In the Product List Selector Window above, we'll click on the "Typ" column and then drag it to the left side, making it the first column, as shown in the figure below.



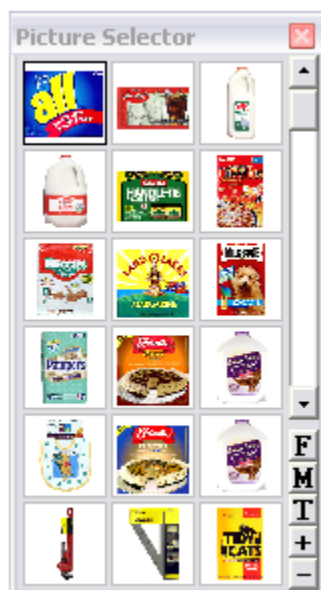


The “Typ” field is now in the first column.

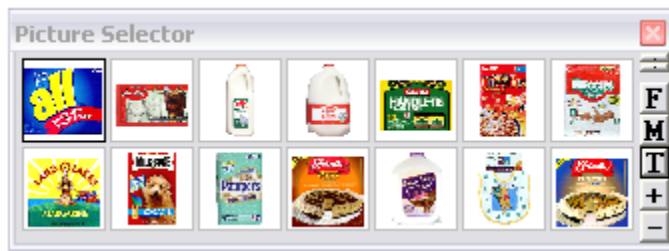
## Product Picture Selector Window

The Product List Selector Window lets you choose products by their photo images. This window is very flexible, letting you display pictures in a range of sizes, and optionally display a field value below the photo. In addition, there’s a magnifier to view selected products when you’re using a very small picture size.

The Product Picture Selector Window can be turned on and off from the View Menu or from the Toolbar. It looks like the figure below.



This displays the product pictures for easier selection.. The Product Picture Selector Window can be sized to any shape. Here it’s 3 pictures wide by 6 high.



Here's the Product Picture Selector Window as 2 high and 7 wide.

In the lower right of the window are 5 buttons, marked "F", "M", "T", "+" and "-".

F = Filter

M = Magnifier

T = Toggle Text display

+ = Enlarge Pictures

- = Reduce Pictures

The "F" button lets you filter the products displayed in the Product Picture Selector Window. The "+" (plus) and "-" (minus) buttons enlarge and reduce the picture size. There are 25 possible sizes ranging from very small (figure on the left) to large (figure on right)

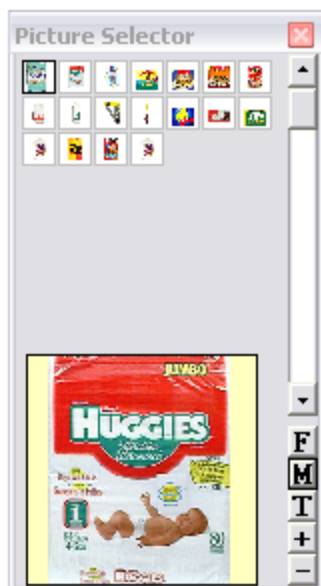


**Smallest Size**



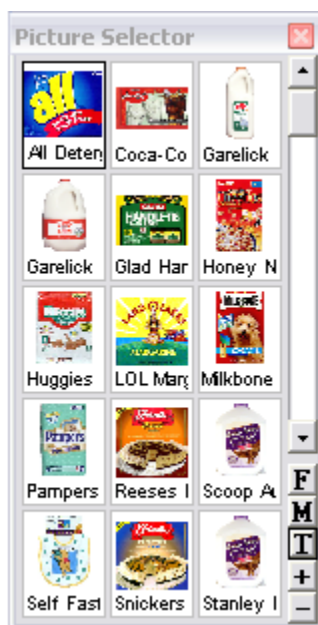
**Largest Size**

Since the smaller size photos can be hard to see, a magnifying feature is available by click the "M" button. A box will appear that magnifies the product under the mouse cursor so you can see it better. This is shown in the figure below.



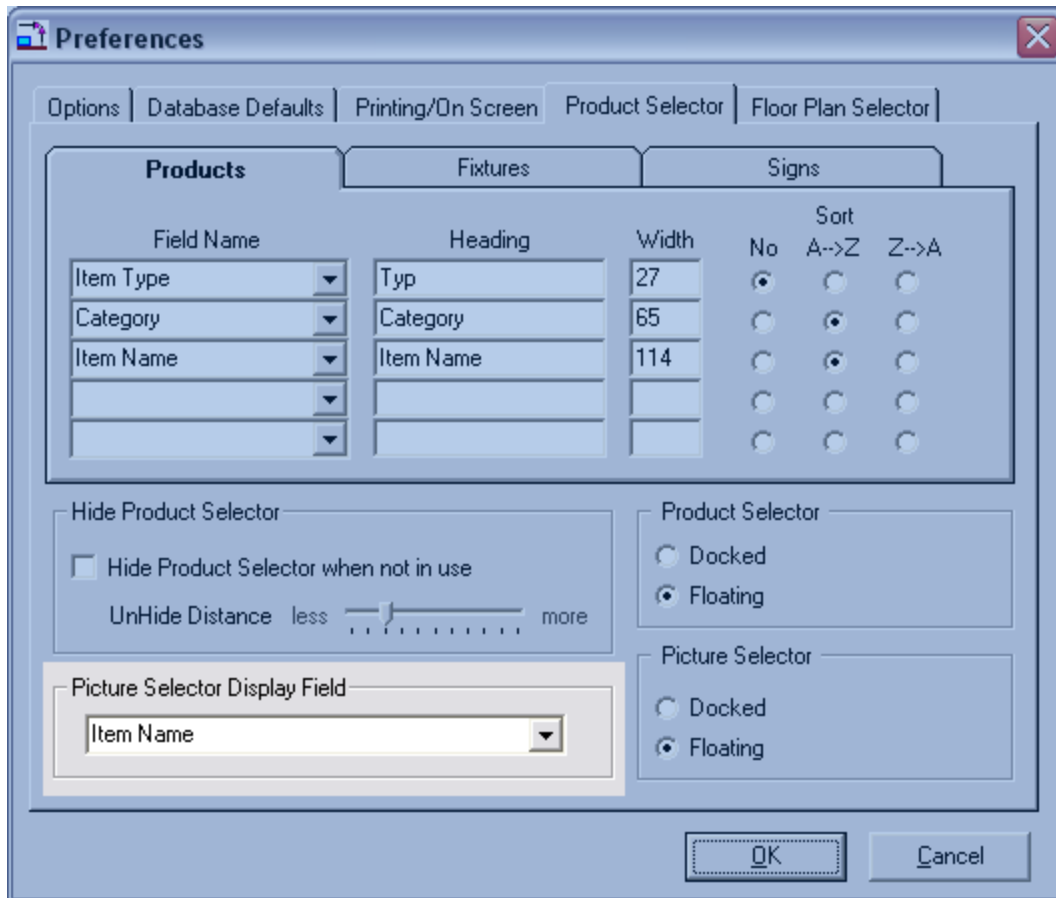
Here the mouse cursor was over the 2<sup>nd</sup> picture in the top row. The magnified product is displayed below. If the mouse moves to a picture towards the bottom of the Product Picture Selector Window, the magnifier moves up to the top so it doesn't interfere with the small product pictures.

To better identify the products, you can use the "T" button to display a field below the product picture, as shown in the figure below.



Clicking the "T" button again will turn off the text under the photos.

The field displayed can be changed to any database field. This is changed in Preferences or you can right click on the Product Picture Selector Window and select "Change Field Displayed".



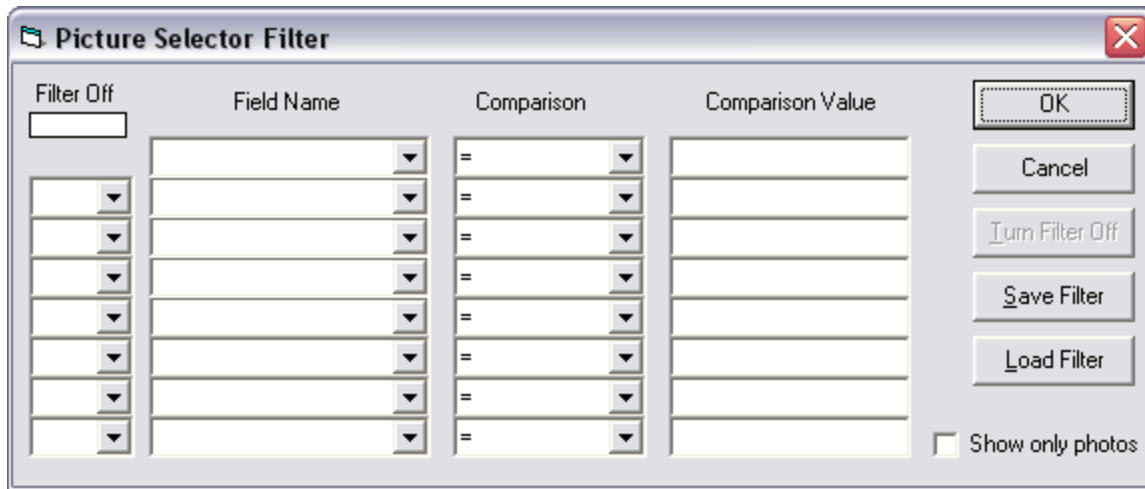
This is the “Product Selector” tab in the Preferences Window. In the lower left is the “Picture Selector Display Field”. Select a field name from the list and click “OK”. This field will be the one displayed in the Product Picture Selector Window.

## Filtering the Item Selector Windows

The products displayed in the Product List Selector Window and Product Picture Selector Window can be filtered so only specific products are seen. This is very useful for large databases.

Each opened plan window has it’s own filter for both the Product List Selector and the picture selector.

In order to filter products, you can right click on the Product List Selector Window (or Product Picture Selector Window) and choose “Filter” from the pop-up menu. In addition, you can choose “Filter Product Selector” or “Filter Picture Selector” from the “View” menu.



The figure above is the filter window for the Product Picture Selector Window. Except for the “Show only photos” checkbox, this filter window is the same as for the Product List Selector Window.

If you click the “Show only photos” checkbox, then only those products that have photos will be selected.. This is used in combination with any other fields used for filtering.

Here you can enter up to 8 field comparisons to select the desired products. In the *Field Name* combobox, select the desired field to use for the comparison. Then select the comparison from the list, equals is the default. Then enter the Comparison Value for that field.

#### Comparisons include:

=  
<>  
>  
>=  
<  
<=

Starting With  
Ending With  
Containing

If you want to use more than one field for a comparison, the first column of comboboxes let you select “AND” or “OR” for the comparisons.

Let’s try some examples.

Our first filter will select only those product that have a category of “hardware.. We select “Category” from the *Field Name* list, select “=” (equals) from the *Comparison* list and enter “hardware” for the *Comparison Value*.

The filter window will look like the figure below.

The screenshot shows the 'Picture Selector Filter' dialog box. It has a 'Filter Off' checkbox, a table with four columns: 'Field Name', 'Comparison', and 'Comparison Value'. The first row is populated with 'Category', '=', and 'hardware'. There are five empty rows below it. On the right, there are buttons for 'OK', 'Cancel', 'Turn Filter Off', 'Save Filter', and 'Load Filter'. At the bottom right, there is a checkbox labeled 'Show only photos'.

Filter Off	Field Name	Comparison	Comparison Value
<input type="checkbox"/>	Category	=	hardware
<input type="checkbox"/>		=	
<input type="checkbox"/>		=	
<input type="checkbox"/>		=	
<input type="checkbox"/>		=	
<input type="checkbox"/>		=	
<input type="checkbox"/>		=	

The *Comparison Value* of hardware is entered in lower case here. The case doesn't matter. Upper, lower or mixed case are all considered the same.

## OR Comparisons

Let's add another category to the filter. We'll also select products with a category of "grocery", as shown below. We use the "OR" to connect the two comparisons. So the filter will display product with a category of hardware or grocery.

The screenshot shows the 'Picture Selector Filter' dialog box with two filter rules. The first rule is 'Category = hardware' and the second rule is 'Category = grocery'. The 'Comparison' column for both rules contains '='. The 'Field Name' column for both rules contains 'Category'. The 'Comparison Value' column contains 'hardware' and 'grocery' respectively. The 'Filter Off' checkbox is present. On the right, there are buttons for 'OK', 'Cancel', 'Turn Filter Off', 'Save Filter', and 'Load Filter'. At the bottom right, there is a checkbox labeled 'Show only photos'.

Filter Off	Field Name	Comparison	Comparison Value
<input type="checkbox"/>	Category	=	hardware
Or <input type="checkbox"/>	Category	=	grocery
<input type="checkbox"/>		=	
<input type="checkbox"/>		=	
<input type="checkbox"/>		=	
<input type="checkbox"/>		=	
<input type="checkbox"/>		=	
<input type="checkbox"/>		=	

## AND Comparisons

If we use the "AND", we can make the product match two criteria. In this next example, we'll select product with a category of hardware and, in addition, also select those products with a retail price greater than 5.00 dollars, as shown in the figure below.

Filter Off	Field Name	Comparison	Comparison Value
<input type="checkbox"/>	Category	=	hardware
And	Unit Retail Price	>	5.00
		=	
		=	
		=	
		=	
		=	
		=	

This filter will select products with a category of hardware and a unit retail price more than 5.00 dollars.

### Combining AND OR Comparisons

When using AND and OR together in a filter, the field joined with AND are connected as if they were surrounded by parenthesis and take precedence over an OR comparison. For example, lets look at the following filter.

Filter Off	Field Name	Comparison	Comparison Value
<input checked="" type="checkbox"/>	Category	=	hardware
Or	Category	=	grocery
And	Unit Retail Price	>	5.00
		=	
		=	
		=	
		=	
		=	

This filter reads as:

Category = hardware OR (Category = grocery AND Unit Retail Price > 5.00)

If you want the retail price > 5.00 to be for both categories, the filter has to look like:

Filter Off	Field Name	Comparison	Comparison Value
<input type="checkbox"/>	Category	=	hardware
And	Unit Retail Price	>	5.00
Or	Category	=	grocery
And	Unit Retail Price	>	5.00
		=	
		=	
		=	
		=	

☐ Show only photos

This filter now reads as:

(Category = hardware AND Unit Retail Price > 5.00) OR (Category = grocery AND Unit Retail Price > 5.00)

Now products from both categories with a retail price greater than 5.00 will be selected.

Clicking OK will use this filter for the Product or Product Picture Selector Window.

### ***Turning Filter Off***

To turn off the filter, select the filter option from the menu. You will see a window like the figure below.

Filter On	Field Name	Comparison	Comparison Value
<input checked="" type="checkbox"/>	Category	=	hardware
		=	
		=	
		=	
		=	
		=	
		=	
		=	

☐ Show only photos

The “Filter On” box is colored red. To indicate a filter in use. To turn off this filter, click on the “Turn Filter Off” button.



## ***Loading and Saving Filters***

Once a filter has been created, it can be saved and loaded again at another time. Just click on the “Save Filter” button and you can enter the name of the newly saved filter.

Clicking on the “Load Filter” button will let you enter the name of a filter to use. Once loaded, you can use the filter as is, or you can modify it.

## ***AutoLoad Filter***

There’s a special kind of filter, the *AutoLoad* filter. If you save a filter and give it the same name as your plan, when the plan is opened, this filter will be loaded automatically and be in effect immediately. It would look like this plan had a smaller database.

## **Placing Items on Shelves**

Both shelf item types and peg item types can be placed on shelves. If a shelf item is not properly positioned on the shelf, or does not fit in the selected position, a warning message will alert you. In manual mode these warning messages can be overridden and the item can be placed anywhere on the planogram. Use caution when overriding warnings since it is possible to place an item where no real space exists.

# Placing Items on Hooks

Peg items are added in the same manner as shelf items, either by dragging it from the item listbox onto the plan or by double-clicking the item.

When a product is placed in a peg area, the peg hook automatically goes along with the product. Peg hooks are not placed by themselves. When a peg item is added to the peg area, it is assigned the default hook size but this can be changed for individual products at any time. Just select one or more faces, and use the Face menu and select “Change Hook Length”.

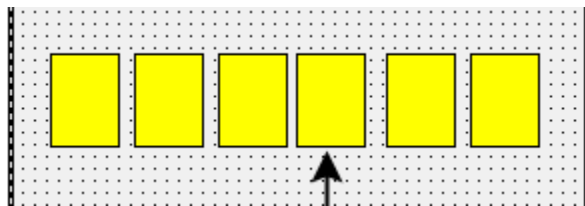
The default peg hook length can also be changed in Display Setup, by using the View-Setup-Display Setup menu command or by double-clicking on the plan.

## ***Peghole Alignment***

When a peg item is placed, the peghole in the product (as defined as the Peghole Left and Peghole Left fields) is placed over the peg hook. This is as it would be in real life.

When moving a peg item on the planogram, the item will only move in peghole increments. If the vertical distance between pegholes is one inch, then the item will only move up and down an inch at a time. This way, the product’s peghole is always over a peg hook. Otherwise you could create a planogram that couldn’t be built.

While normally the product peghole is over the peg hook, sometimes this changes (like when aligning items, which doesn’t consider peghole alignment). You may notice this if a group of similar sized peg items become misaligned, as shown below.



The arrow is pointing to a product face that’s not aligned to the peghole. All items are the same and you can see that they all line up with equal spacing except the face to which the arrow is pointing.

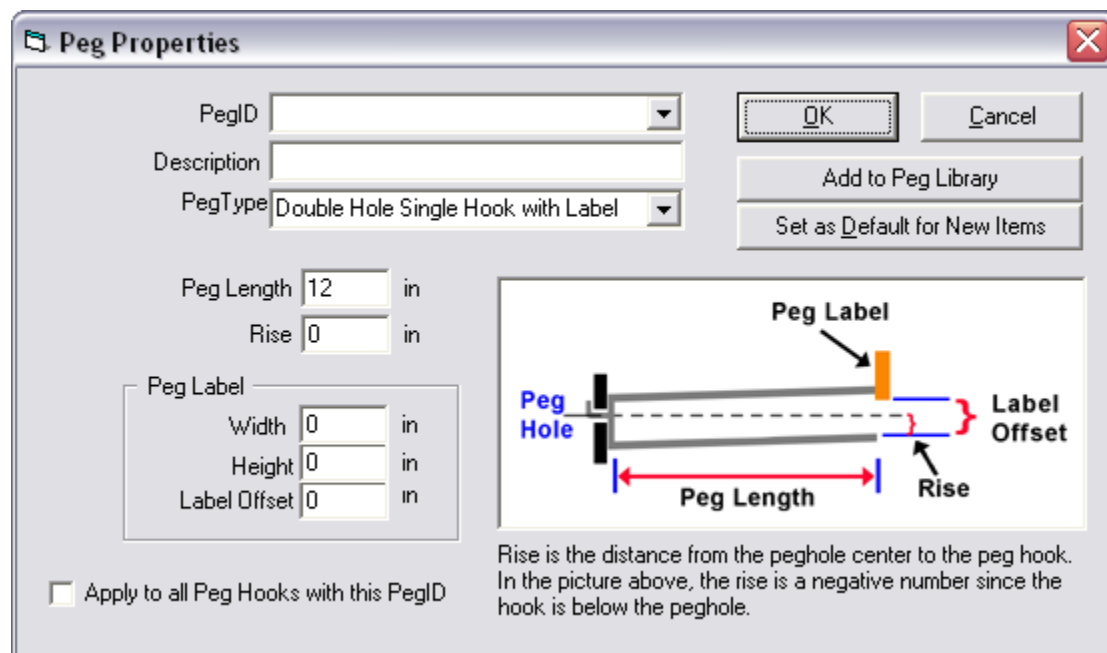
To fix this, there’s a command that will align one or more faces to their proper pegholes. Select one or more faces and use the Peg Align command. From the Face menu, select “Align”, then select “To Peghole”. The selected items will be placed onto the nearest peg hook. You may need to move the faces if they align to a different peghole than desired.

## **Peg Hook Styles**

There are several hook styles available and you can customize them with different measurements.

## Peg Properties

You can change the peg properties and configure the peg hook. You can reach the Peg Properties window from the View – Setup – Peg Properties menu selection. Or, if Location Grouping is turned on, double-click to show the location properties. In that window you'll find a button for the Peg Properties window.. which is shown in the figure below.



### Peg ID

This combobox contains a list of all of the already saved pegs. You can select from this list or just create a new Peg ID. If you enter a peg ID for a newly defined peg, it will be saved to the Peg Library and will be available in the PegID combobox.

### Peg Type

This lets you define the type of peg hook. The choices are:

- Single Hole Hook
- Double Hole Single Hook
- Double Hole Single Hook with Label
- Double Hole Rounded Wire
- Double Hole Rounded Wire with Label

Examples of these peg hook types:



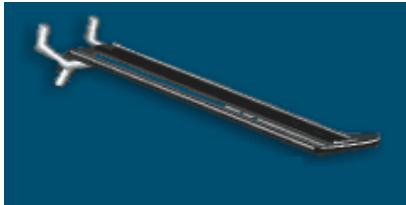
Single Hole Hook



Double Hole Single Hook



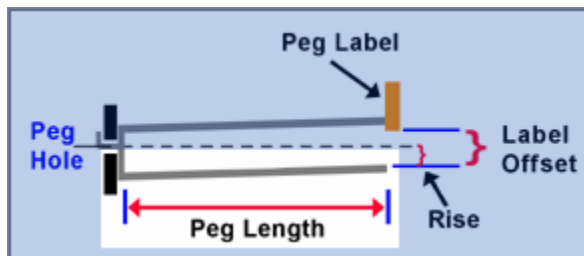
Double Hole Single Hook with Label



Double Hole Rounded Wire

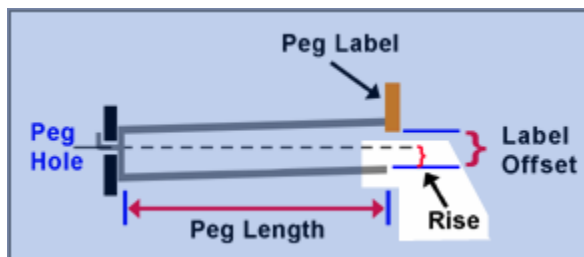
### Peg Length

The Peg Length is the length of the peg hook from the peg board to the end of the hook, as shown in the figure below.



### Rise

The *Rise* is the distance from the center of the peg hole to the center of the peg hook. In the figure below, the dotted line is the center of the peg hole. The *Rise* is the distance down to the hook, which is slightly below the dotted line.



Since the peg hook is below the peg hole, the distance is a negative distance. The *Rise* is measured from the peg hole center to the hook center. The other wire above the peg hook is to hold the peg label and is not used for the *Rise* measurement.

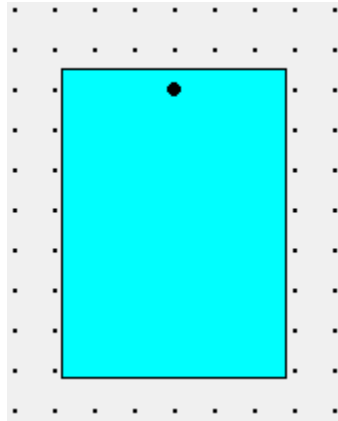
On the screen and in print the *Rise* is used as follows: The peg hole in the product is centered over the peg hook. The plan has the peg holes in it, so the rise tells the program where to place the product's peg hole so it's over the hook, not the peg hole.

### Peg Placement

Shelf Logic will place the product peghole directly over the peg hook. The placement depends upon the peg type and the peg *Rise*. Let's look at the different peg hook types.

### Single Hole Hook

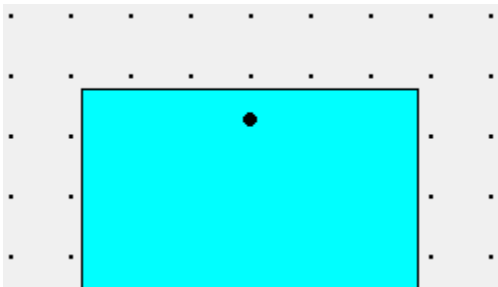
For a single hook, the product's peg hole (the larger black dot in the blue product face) is always vertically lined up with the peg hole in the backboard (the small dots), as shown in the figure below. This product has a peghole top of  $\frac{1}{2}$  inch and the pegholes are an inch apart. So the top of the product is  $\frac{1}{2}$  inch above the product peghole. In the figure below, you can see that the top of the product face is halfway between the two peghole.



In the figure above, the peg hook has a rise of 0, which means that the hook is directly over the peg hole. In this case the product peghole is directly over the backboard peghole

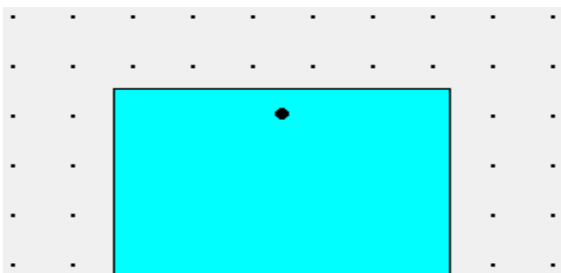
In the figure below, we defined a rise of  $\frac{1}{4}$  inch. This means that the actual hook is  $\frac{1}{4}$  inch above the peg hole on the backboard. In the figure below, you can see that the top of the product face is  $\frac{1}{4}$  inch higher than in the previous figure, which had no rise.

In the figure below the product's peghole is over the peg hook, which is  $\frac{1}{4}$  inch above the backboard peghole.



### Double Hole Single Hook

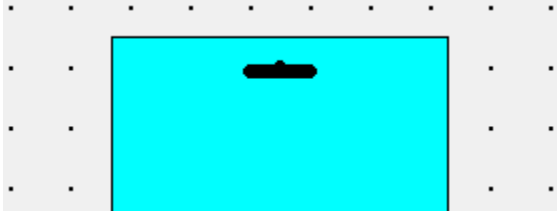
The double hook works essentially the same as the single, except that the product peghole is placed horizontally halfway between the pegholes, instead of over directly the peghole.



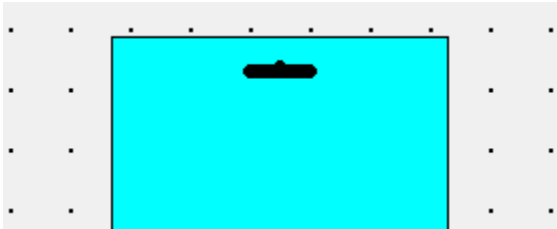
With the Double Hole hook, it uses two peg holes to support a hook between the two peg holes, as shown in the figure below. In the figure above, you can see that the product peg hole is halfway between the backboard peg holes.

#### Double Hole Rounded Wire

The Double Hole Rounded wire is and functions the same as the Double Hole Hook. The only difference is the way the peg hole looks, as shown in the figure below.



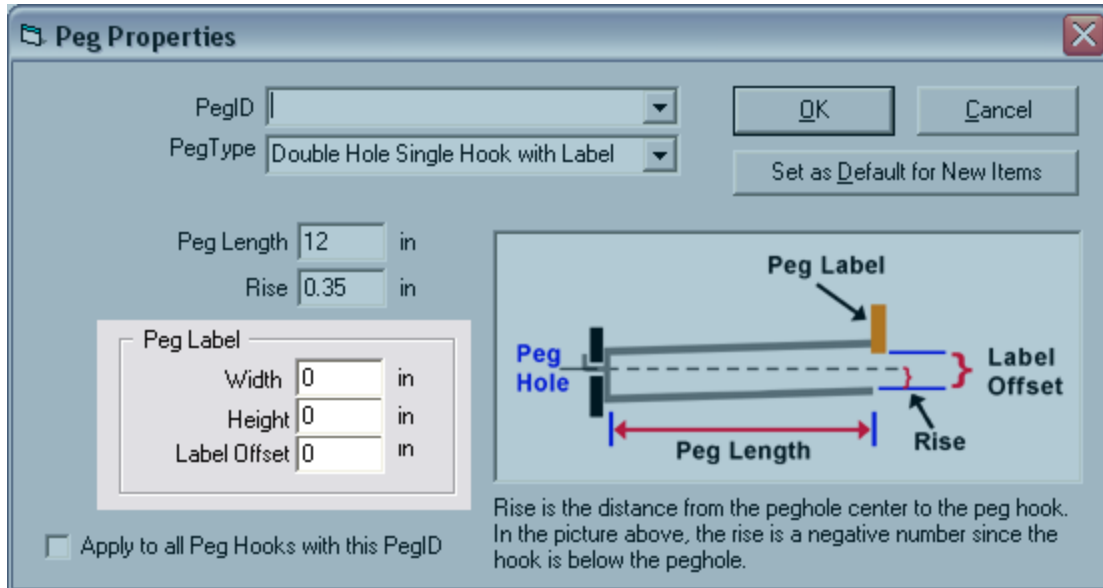
As with the Single Hook, the Double hooks can also have a Rise that will change the vertical offset of the product's peg hole.



In the figure above, the peg hook has a rise of .35 inches. This pushes the peg hook (and thus the product's peg hole which must be over the peg hook) up .35 inches.

# Peg Labels

Two peg hook types offer peg labels. If you choose either “Double Hole Single Hook with Label” or “Double Hole Rounded Wire with Label”, you will be asked for the label dimensions. This is shown highlighted in the figure below.



## Width

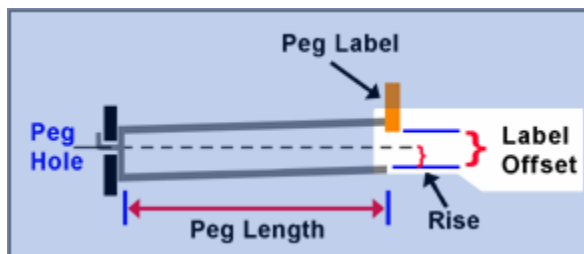
This is the width, in inches or cm, of the peg label.

## Height

This is the height, in inches or cm, of the peg label.

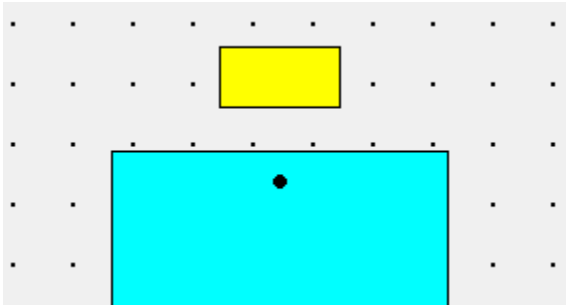
## Label Offset

This is the distance from the top of the peg hook wire to the bottom of the label, as shown in the figure below.



## Displaying Peg Labels

You can turn the display for peg labels on and off from the View menu. Choose “View-Display-Show Peg Labels” to toggle the peg label display on and off.



The figure above is a Double Hole Single Hook with Label. The label (the yellow box) is 3 inches wide and 1  $\frac{3}{4}$  inch high with a label offset of 1 inch. This means the bottom of the label (the yellow box) is 1 inch from the top of the peg hook (the black dot in the blue box).



# Clip Strips

Clip Strips are handled similar to nested item. For the clip strip product, you specify the distance between products on the strip as the nest amount. This is entered in the Product Info window, as shown in the figure below.

The Product Information window for 'Pineapple Juice' (UPC Code: 4850005000) is shown. The 'Dimensions' tab is active. The 'Item Type' is set to 'Shelf'. The 'Unit of Measurement' is 'English (in)'. The 'Merch Style' is 'Unit'. A table lists dimensions for different units: Unit, Tray, Case, and Display. The 'Nest Amount' is set to 3, and the 'Weight' is 0. A red arrow points to the 'Nest Amount' field.

	Width	Height	Depth	Pack	Eff Date	Avg Cost	Avg Sell Price	Avg Retail
Unit	3.875	9.5	3.875	1		\$0.96	\$1.32	\$1.98
Tray	15.5	9.5	15.5	16		\$15.36	\$18.48	\$27.72
Case	15.5	19	23.25	48		\$46.08	\$58.08	\$87.12
Display	11.625	9.5	3.875	3		\$2.88	\$3.96	\$5.94

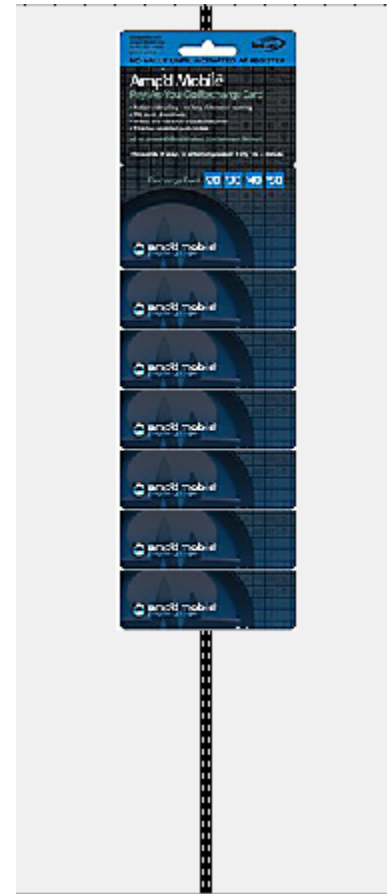
In addition to specifying the nest amount, you need to set the peg property for the clip strip product. This is done in the Peg Properties Window, as shown below.

The Peg Properties window is shown. The 'Peg Type' is set to 'Clip Strip'. The 'Peg Length' is 12 in, and the 'Rise' is 0 in. The 'Peg Label' section shows 'Width' as 2 in, 'Height' as 1 in, and 'Label Offset' as 1 in. A diagram illustrates the 'Peg Label' with 'Peg Hole', 'Peg Length', 'Rise', and 'Label Offset' labels. A red arrow points to the 'Peg Type' dropdown. A text box explains that 'Rise' is the distance from the peghole center to the peg hook, and it is a negative number if the hook is below the peghole.

"Rise is the distance from the peghole center to the peg hook. In the picture above, the rise is a negative number since the hook is below the peghole."

Set the *Peg Type* to “Clip Strip”, as shown above.

Then position the product at the topmost position of the clip strip, then use the Duplicate Up command to create the other product on the clip strip. Because the Peg Type is set to Clip Strip, the product on the strip are duplicated downwards.



On the left above, we have the initial clips strip product. It's selected, and the Duplicate Up command used 6 times, we now have 7 products on the clips strip, as shown on the right.

# Merchandising Styles

Shelf Logic Enterprise Edition supports up to 5 concurrent merchandising styles: units, tray, case, display and alternate. These are the names we've given to them, you can use these for other merchandising styles of your own. For each merchandising style, there is a separate cost and selling price, separate width, height and depth measurements and number of units in the style. And each merchandising style can have its own photo images (for front, side and top).

There are several places in the program where you can define which merchandising style to use. The first place is in the Product Information window. In the Dimensions tab, there's a place for the default merchandising style for this product. When this product is placed on the plan, this merchandising style will be used.

After a product is on the plan, its merchandising style can be changed. Just select one or more faces and from the Face menu, select "Change Merch Style". You can then enter a different merchandising style for the selected products.

Another way to change the merchandising style of products already on the plan is through the Location window. When Location Grouping is turned on and you double-click on a location, you can then change the merchandising style of all products in the location group.

## ***Changing the Default Merchandising Style for a Plan***

When a plan is first created, you can specify an over ride merchandising style for the plan. So regardless of the products merchandising style, the over riding style will be used. You can still change the merchandising style of the product after it's placed on the plan.

For example, product "ABC" is normally displayed in units. Normally, when added to a plan, a unit is added. But for this particular plan, we specify tray for the over ride merchandising style. So when product "ABC" is added to the plan, it's added as a tray style.

## **2. Adding Products by Double-Clicking the Selector Windows**

You can double-click on a product in either the Product List Selector Window or Product Picture Selector Window and this product will appear in the upper left corner of the plan. You can then drag it into position. If the Next Location feature is on, then instead of appearing in the upper left corner, the product will appear in the next available location of the last selected shelf.

### ***Next Available Location***

The Next Available Location feature is turned on and off by selecting it from the Tools Menu. When placing a Shelf Item, the Next Available Location feature will automatically place items in the next available space on the selected shelf. Items are placed from left to right until all available space is filled. This is the easiest way to fill available shelf space with individual items.

When adding a Peg Item, the Next Available Location feature will place the item on the selected shelf as a shelf item. To add a Peg Item to the pegboard or slat wall area, this feature must be turned off.

When there is not enough space to place an item on the selected shelf, a warning message will alert you. To continue adding items you must select another item, select another shelf, or shut off the Next Available Location feature and add the item manually. The item will then appear at the top left corner of the Plan Window and can be dragged to the desired location. Use the Flip Feature to fit the item in the available space (see Section 5 – Flip Feature).

## **3. Adding Products by Dragging from other Plan Windows**

You can have up to 10 open plan windows and you can drag and drop product between them. When dragging product to another plan window, that other window must be right next to or overlapping. You can't drag products through other opened plan windows into the destination plan window.

If you drag a product into another plan with a different database and that product doesn't exist in this other database, then the program will alert you and let you add the product to the new database. The product will be added to the plan and the database.

## 4. Adding Products by Using Cut/Copy/Paste

Another way to add products and/or shelves is by using the standard Windows Cut, Copy & Paste features. After cutting or copying an item, it can be pasted repeatedly into different locations on the planogram.

### The Cut Command

Hot Button:	Cut
Menu:	Edit/Cut
Keyboard Shortcut:	<Ctrl + X>

Upon executing one of the above commands, the selected shelf and/or items are removed from the original location and can be pasted into a new location. The Cut command is different from the Delete command in that Cut stores the objects for reuse and Delete removes the objects from the plan permanently.

### The Copy Command

Hot Button:	Copy
Menu:	Edit/Copy
Keyboard Shortcut:	<Ctrl + C>

The Copy command works the same way as the Cut command except that it copies the selected items/shelves, leaving the originals in place. Copies can then be pasted into a new area of the planogram.

### The Paste Command

Hot Button:	Paste
Menu:	Edit/Paste
Keyboard Shortcut:	<Ctrl + V>

The Paste command will place the contents the cut or copied items into the upper left corner of the Planogram Window. Pasted items will be highlighted so that you can move them into place. You can use the Paste command repeatedly.

## 5. Duplicating Products

Hot Button:	Dup Right Dup Up
Menu:	Item/Duplicate Right Item/Duplicate Up

Once you have items on the planogram, you can duplicate them using one of three methods. With a little practice, you will discover which method is best suited to each situation.

The Duplicate Up Command will copy a selected item facing and stack the copy on top of the original. You can Duplicate Up repeatedly until you run out of space.

The Duplicate Right command works the same way, but will place the copy to the right of the original. This is the easiest method for duplicating facings of items.

### **Duplicate Copy**

Another way to create duplicates is to select a shelf, an item, or a group, and hold down <Ctrl>, while dragging the selection to a new location on the planogram. As you drag, the original selection stays in place and the duplicate moves along with the mouse pointer to the new location. This method is best used when duplicating groups.

### **Copy Image to Clipboard**

This command will copy the selected items and/or shelves to the Windows clipboard for pasting into other documents, such as MS Word or Excel.

## 6. RIP Processor

The RIP Processor lets you add products to the plan by specifying the product's UPC Code. The UPC Codes are put together into a list, or Queue. This list can then be placed on a shelf or a peg area with a single mouse click. You can even fill the entire place from the RIP Queue.

Read more about this in chapter 6.

# Selecting Items

In order to indicate one or more product faces for various operations such as product movement, you *Select* the product face(s).

You can select a group of items, or items and shelves, by drawing a lasso (a dashed line) around the items. You only need to include a portion of an item in the lasso to include it in the grouping.

To draw a lasso around a group:

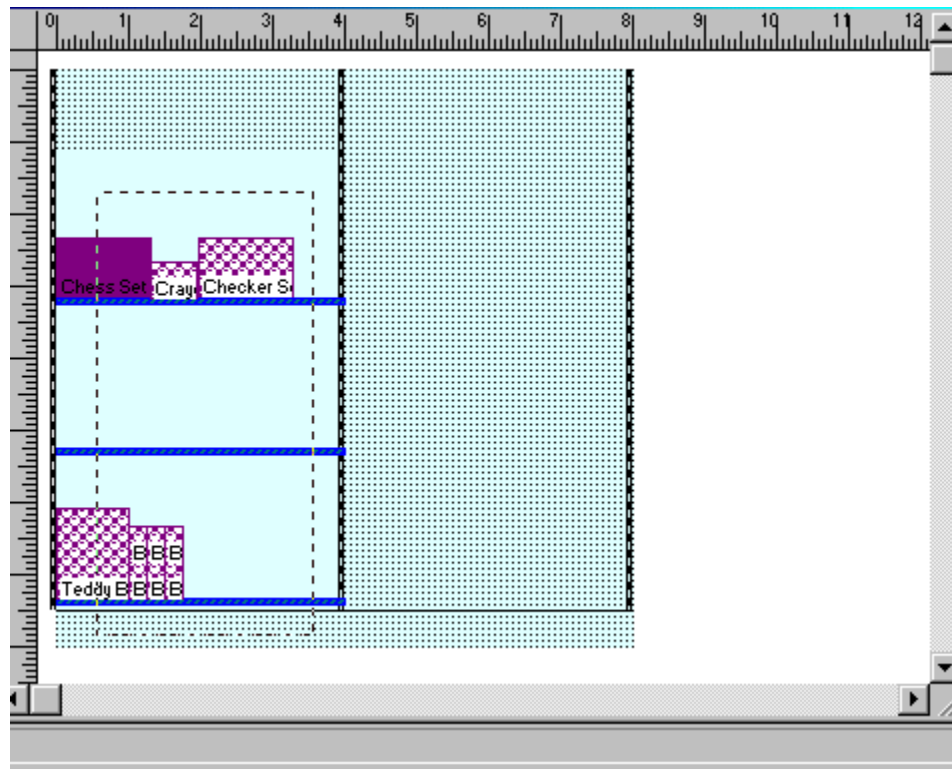
1. Position the mouse pointer just outside one corner of the group.
2. Hold down the left mouse button and drag the mouse so that the lasso forms around each item, or a part of each item. The mouse can be dragged up, down, left, right or diagonally.
3. Release the mouse button.

When the mouse button is released, all of the items in the group will be selected (red). The group can then be moved, copied or deleted.

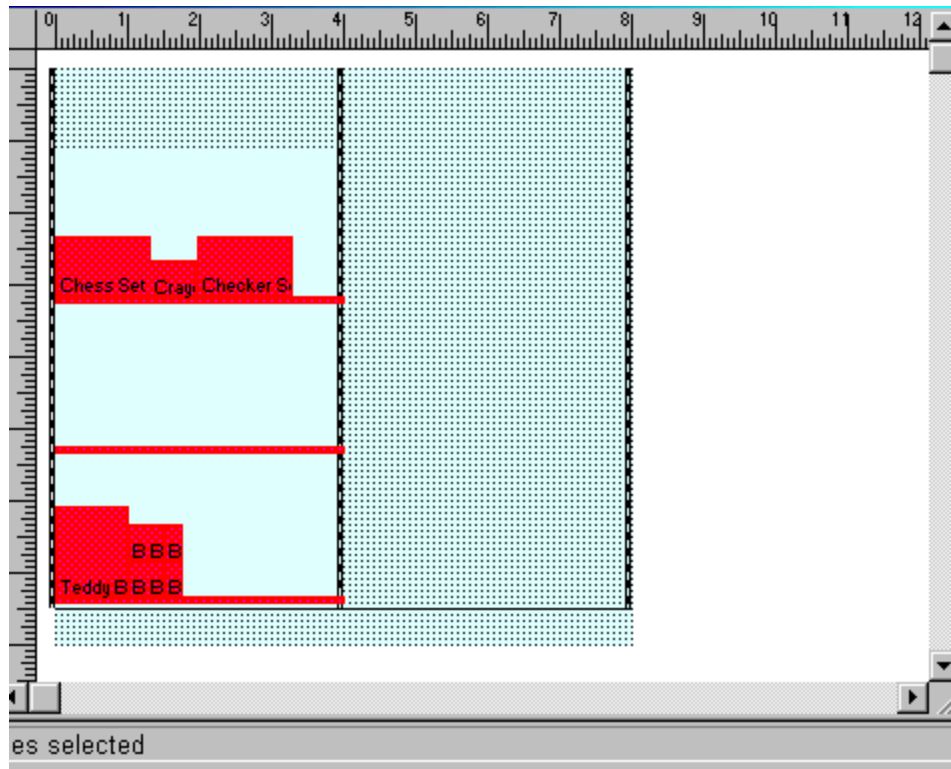
When including shelves in a grouping, at least one shelf in the group must contain an item--you cannot select empty shelves using this method. Use the Lock Shelves feature on the Shelf Menu to prevent shelves from accidentally being moved with groups of items.

In addition to moving groups of items, you can also use this feature to change peg hook size or stacking numbers for a group of items on the planogram. Select the group, select Items Menu/Change Hook Length, or Items Menu/Number in Stack and make the changes for all items in the group at the same time.

To de-select a group, click anywhere outside of the group.



**Figure 20. Drawing the Lasso**



**Figure 21. The Group Formed by the Above Lasso**

### ***Selecting Items Using the Shift Key***

You can select multiple items by holding down the SHIFT key while clicking the mouse over an item. You can also add items to a select group as well.

### ***Selecting Items Using the Layer Manager***

Products can be selected using the *Layer Manager* feature. See the section of the Layer Manager for more details.

### ***Selecting Items in a Background Fixture***

If the items you want to select are within a Background Fixture, then hold down the CONTROL key while drawing a lasso (dashed line) around the items.



# Flipping and Turning Items

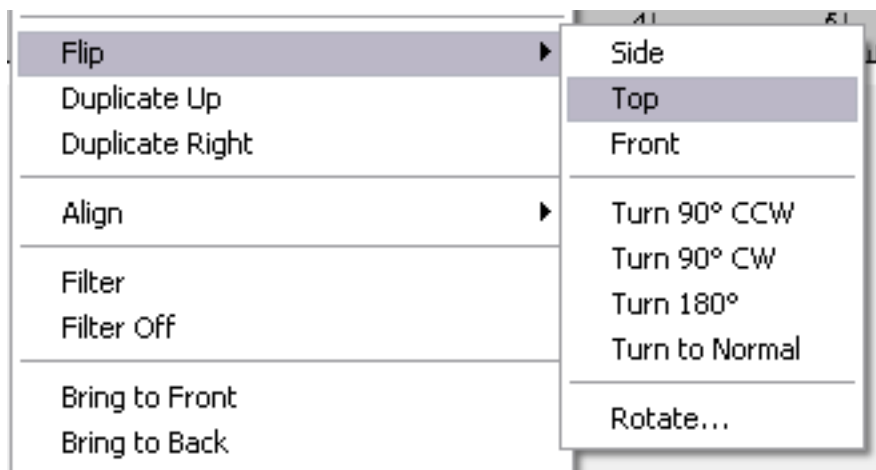
Hot Button: Flip  
Menu: Item/Flip

An item on the planogram can be flipped onto one of three sides. Executing one of the above commands will flip the selected item to the next side. The Status Bar will display the current side number and corresponding dimensions. If 3-sided image files are used, the appropriate image will be displayed for each side.

The Flip feature is useful for filling excess space at the end of a shelf. By shutting off Smart Shelf and Next Loc, you can manually add an item and flip it until it fits the available space.

There are 3 sets of command that handle product flipping. There is the “Flip” command, the Turn command and the Rotate command.

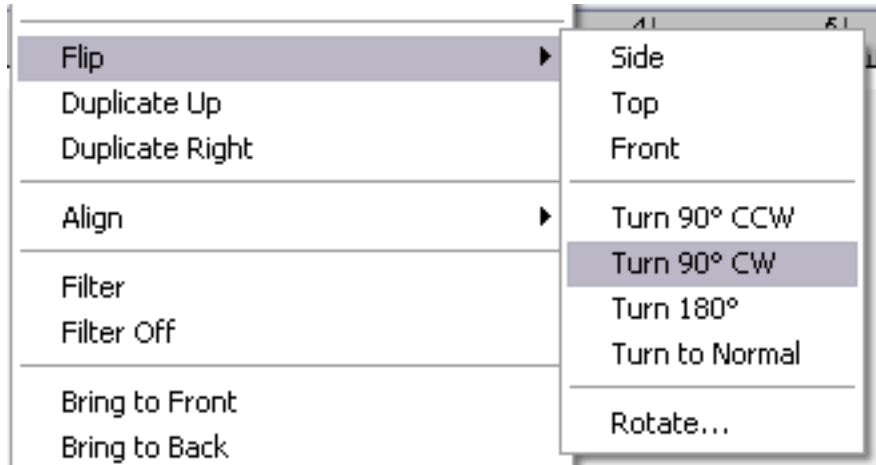
When you flip an item to the side, top or front, it will do so regardless of the previous angle of rotation, if any.



## Turn an Item

The “Turn” command will turn an item upside down or turn it 90 degrees clockwise or counter clockwise. The “Turn” command can be found on the “Item - Flip” submenu and is only active when one or more items are selected.

You can turn the selected item or items 90 degrees clockwise or counter clockwise, upside down or right side up. Turning an item is the same as rotating it in the Z-Axis.



You can turn an item regardless of its current angle of rotation on the X-Axis or Y-Axis. The other angles don't change, only the Z-Axis is when turning an item.

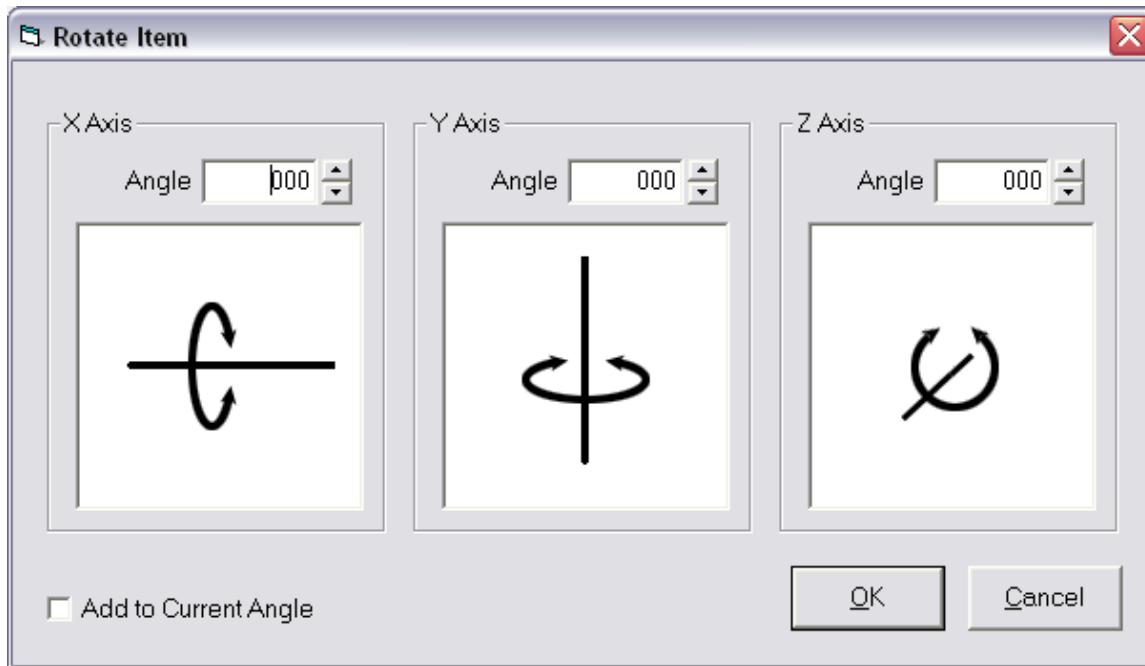
When you turn an item, it will do so regardless of the previous angle of rotation, if any.

When you specify a turn angle, the item is turned to this always starting at right side up. So if you turn an item 90 degrees clockwise and then turn the item 90 degrees counter-clockwise, the item will end up turned 90 degrees counter-clockwise starting at the right side up position. If the turn started at the previous position of 90 degrees clockwise, the item would end up back at its right side up position.

When an item is turned, its product image is also turned automatically.

## Rotate an Item

This command lets you rotate an item to any angle in 3 dimensions. The Rotate command is accessed through the Item – Flip submenu. When you select the Rotate command, you will see the following window:



An item can be rotated on the X, Y and Z axis. For each, you can enter an angle from 0 to 359. The item will then be rotated to that angle. If you check the “Add to Current Angle” checkbox, then the angles specified will be added to the current angles of rotation.

Below each axis is an illustration of the way the item rotates on this axis. For the X axis, the axis goes through the sides of the item. When it’s rotated, it tilts towards you, so that at 90 degrees, you are seeing the top of the item.

For the Y axis, the axis goes through the top and bottom of the item. As it’s rotated, the right side of the item comes forwards and at 90 degrees, you are seeing the side of the item.

For the Z axis, the axis goes through the front and back of the item. As it’s rotated, it turns clockwise. At 90 degrees, the item is turned on its side.

When you rotate an item, the height and width of the item are changed to reflect the way the item looks like when looking straight at it. It doesn’t try to simulate a 3D effect. For example, when you increase the angle of the X axis and it tilts forwards, it has the effect of reducing the height of the item. As an item is turned on the Z axis, it has the effect of increasing both the height and width of an item. So even though the image is turned and looks the same size, the bounding box that surrounds the item is larger than when the item is not turned.

## Nesting Items

Items can be stacked one inside another, such as baskets, bowls or pots. A base item is placed on the shelf and then duplicated up using the Dup Up feature.

In the Nest Amount field of Product Information, enter the height of the nested item that will show above the base item. This dimension is measured from the top edge of the item downward. For example, if you have a 6 inch high basket and you want the top inch of each basket to show above the base item, enter 1 in the Nest Amount field.



**Figure 22. Nested Baskets**

## Moving to the Next/Previous Item

Menu: Item/Next Previous Item/Shelf

Keyboard: < or > or , or . key

You can use the “<” and “>” keys too move to the next and previous item. An item does not have to be selected. If an item is not selected, the selection will start with the first item or last item if the “<” key is used. If an item is selected, then the selection will move to the next or previous item.

The “<” key is also the “,” (comma) key and either can be used to move the selection to the previous item.

The “>” key is also the “.” (period) key and either can be used to move the selection to the next item.

## **Stacking Multiple Items in a Single Facing**

Shelf Logic lets you put multiple products in a single facing. This is accomplished simply by moving one item over another. Even if they overlap just a little, they are considered in the same facing.

When multiple items are stacked together, they will share the shelf depth. For example, if you have a 12 inch deep shelf with 2 different items in a facing, each item is allotted 6 inches of depth.

## **Selecting an Item in a Multiple Facing**

Clicking on a face selects the first item in that face. If you hold down the CONTROL key and click on the face again, the next item in back will be selected and so forth. If you have 4 different items in a facing, then you can select the last item by clicking on the facing, and then holding down the CONTROL key and clicking three more time.

If you have selected the last item and click again, the first item in the stack is selected.

## **Changing Item Order**

You can change the item order in a multiple stack by selecting an item in the stack and using the “Item – Bring to Back” or “Item – Bring to Front” menu commands to bring the item forwards and backwards through the stack.

## **Reporting Multiple Facing**

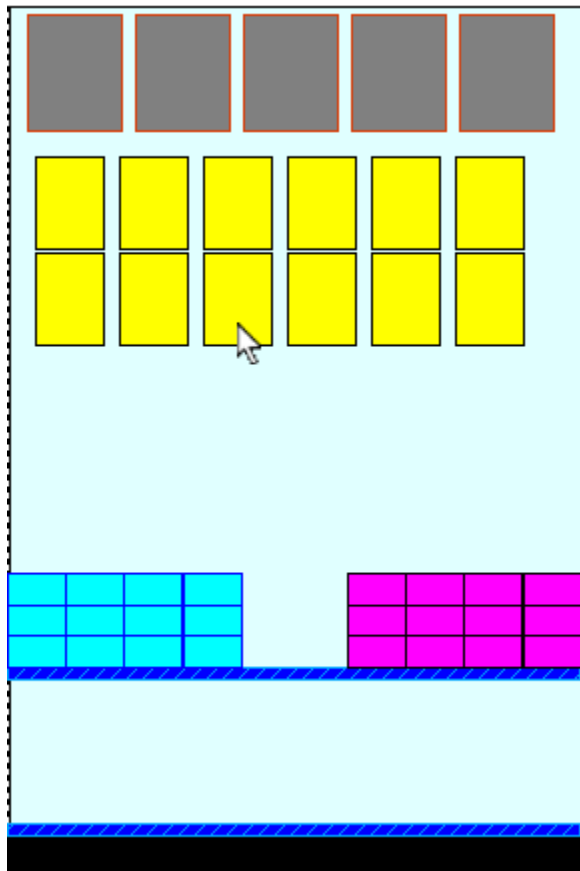
On the Product Listing Report, multiple items have the same key number but a letter is placed after the item to indicate it's part of the same facing. So if we have three different items in a multiple facing, and the key number is 3, then the items will appear on the Product Listing Report as 3A, 3B and 3C.

# Product Positions

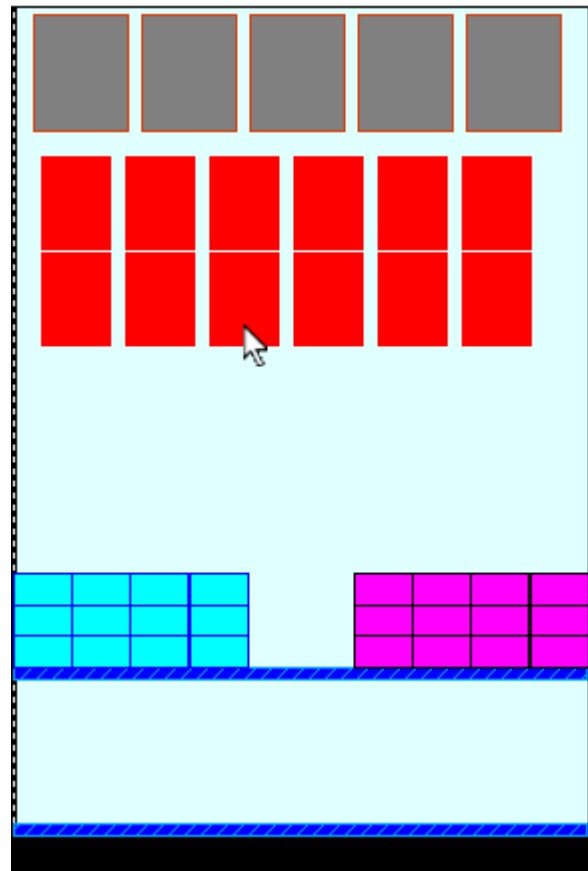
While the program works with individual product faces, you can work with *Product Groups (or Positions)* instead. A *Product Group* is a group of faces with the same UPC Code and is a certain amount of faces wide and high. In the figure on the left below, the faces in yellow are all the same product.

You can work with individual faces or groups when working with the plan.

By pressing F4 function key, the *Location Grouping* is turned on (and off again). When *Location Grouping* is turned on, clicking on one face will select the entire group, as shown in the figure below.



Click on a single face



All faces in the group are selected

In the figure on the left, we select a single face by putting the mouse cursor over the face and clicking the left mouse button. Normally, only the single face would be turned red to indicate it was selected. But with the *Location Grouping* is turned on, all faces in the group are selected, as shown in the figure on the right.

When a group is selected, you can do anything to it you could do to an individual face, move the group, delete the group, etc. You can also change its properties. You can do this from the View menu, just select “Location Properties”. Or you can just double-click on any face in the group. Either way, you will see the Location Properties window, as shown below.

This window has the location information, some of which you can change. The “\*” indicates this information can’t be changed

Location ID – This identifies the location be name or number.

Merch Style – This is the merchandising style for this group..

\*UPC Code – This is the UPC Code of the group and can’t be changed.

\*Item Name – This is the Item Name of the group and can’t be changed.

Peg ID – This is the peg id of the peg used for this group.

Peg Row – This is the row that has the peg hooks used for this group.

Peg Column – This is the column of the peg hook for the first face in the group,

Facings Wide – This is the number of horizontal facings.

Facings High – This is the number of vertical facings.

Facings Deep – This is the number of facing deep.

Position X – This is the X position of the upper left corner of the leftmost face

Position Y – This is the Y position of the upper left corner of the leftmost face

Rotation – This is the current side. You can change it or rotate the group to any angle.

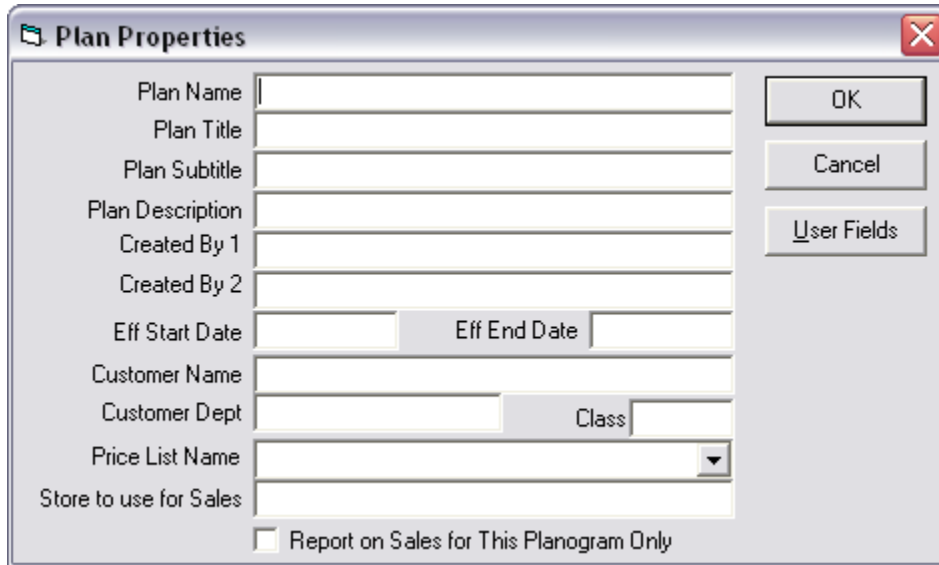
In addition, you can edit the product information for the product in this group.

You can also change the Peg properties for the peg hooks in this group.

The *User Fields* button will let you enter user fields for this position.

# Plan Properties

There are a number of properties available for the plan. To view and change them, choose “Plan Properties” from the View Menu. You will see the *Plan Properties* window:



The screenshot shows the 'Plan Properties' dialog box. It has a title bar with a close button (X). The main area contains the following fields and controls:

- Plan Name: Text input field
- Plan Title: Text input field
- Plan Subtitle: Text input field
- Plan Description: Text input field
- Created By 1: Text input field
- Created By 2: Text input field
- Eff Start Date: Text input field
- Eff End Date: Text input field
- Customer Name: Text input field
- Customer Dept: Text input field
- Class: Text input field
- Price List Name: Dropdown menu
- Store to use for Sales: Text input field
- Report on Sales for This Planogram Only: Checkbox
- Buttons: OK, Cancel, User Fields

All of these fields are optional and are used for informational purpose. Except, the Eff Start Date and Eff End Date fields can be used for reports to define the range of sales dates to be used for the reports, and the Price List Name is used to determine the retail price of the products.

## Plan Name

This is the name of the plan

## Plan Title

This is the title of the plan.

## Plan Subtitle

This is the plan's subtitle.

## Plan Description

This is the description of the plan.

## Created By 1

This is the person responsible for creating the plan.

## Created By 2

This is the other person responsible for creating the plan.

## Eff Start Date

This is the effective starting date of the plan. This can be used for reporting as the start date of the sales data.

## Eff End Date



This is the effective ending date of the plan. This can be used for reporting as the end date of the sales data.

**Customer Name**

This is the intended customer for the plan.

**Customer Dept**

This is the department using the plan.

**Class**

This is the class name of the planogram

**Price List Name**

This is the name of the price list used to determine the retail prices of products on the plan. This can be changed and then the reporting will reflect the retail prices in the new price list.

**Store to use for Sales**

If you are reporting and analyzing sales for the plan, this lets you do so for a specific store, which you enter here. In order for this to work, you must have sales data entered for this store.

**Report on Sales for This Planogram Only**

If you are reporting and analyzing sales for the plan, this lets you do so for this planogram. In order for this to work, you must have sales data entered for this planogram.

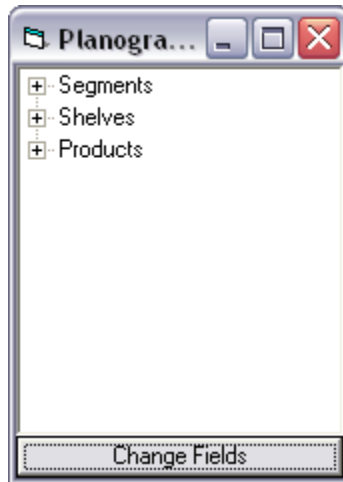
**User Fields Button**

This lets you enter user fields for this planogram.

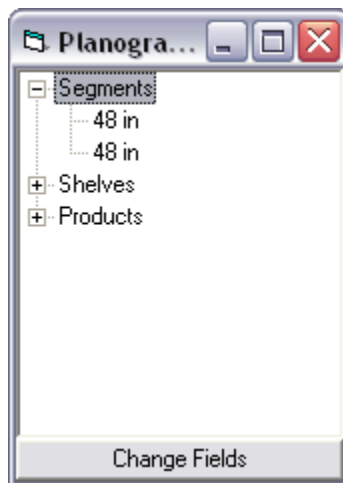
# Planogram Viewer

The Planogram Viewer displays all of the shelves and fixtures with all of the products for the currently active plan window. You can choose up to 4 grouping and sorting levels and you can display any two fields.

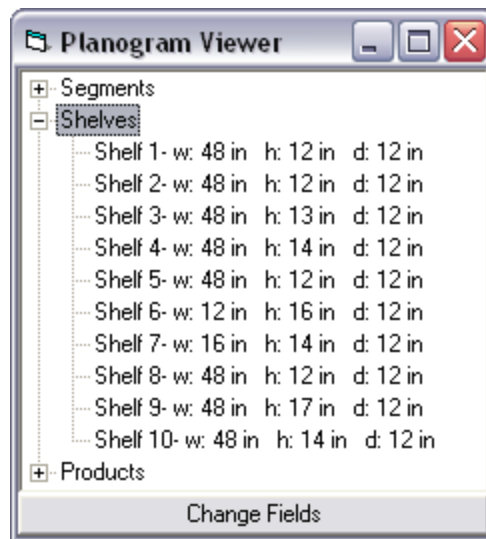
The Planogram Viewer is shown in a floating window you can move or resize. Here's a typical Planogram Viewer:



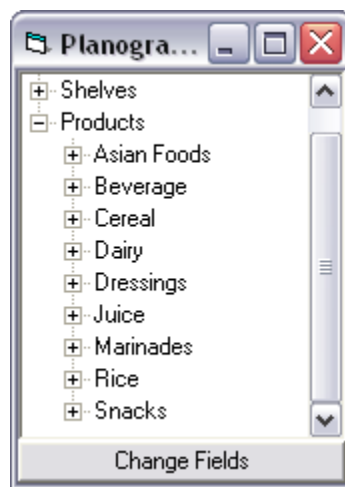
Clicking on the plus sign before Segments will show you the length of each segment, as shown in the figure below.



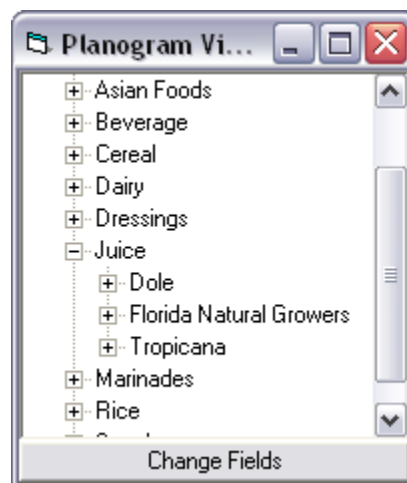
Clicking on Shelves will display the dimensions (length, height and depth) of all shelves, as shown in the figure below.



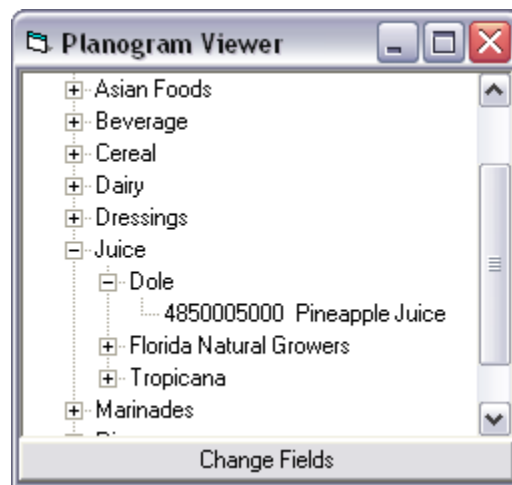
The products portion will break down by up to four groups. Here we are sorting and grouping first on category, as shown in the figure below.



Clicking on any of the categories will show the next group level, which is Vendor Name. If we double-click on Juice, we see the vendors in the Juice group, as shown in the figure below.

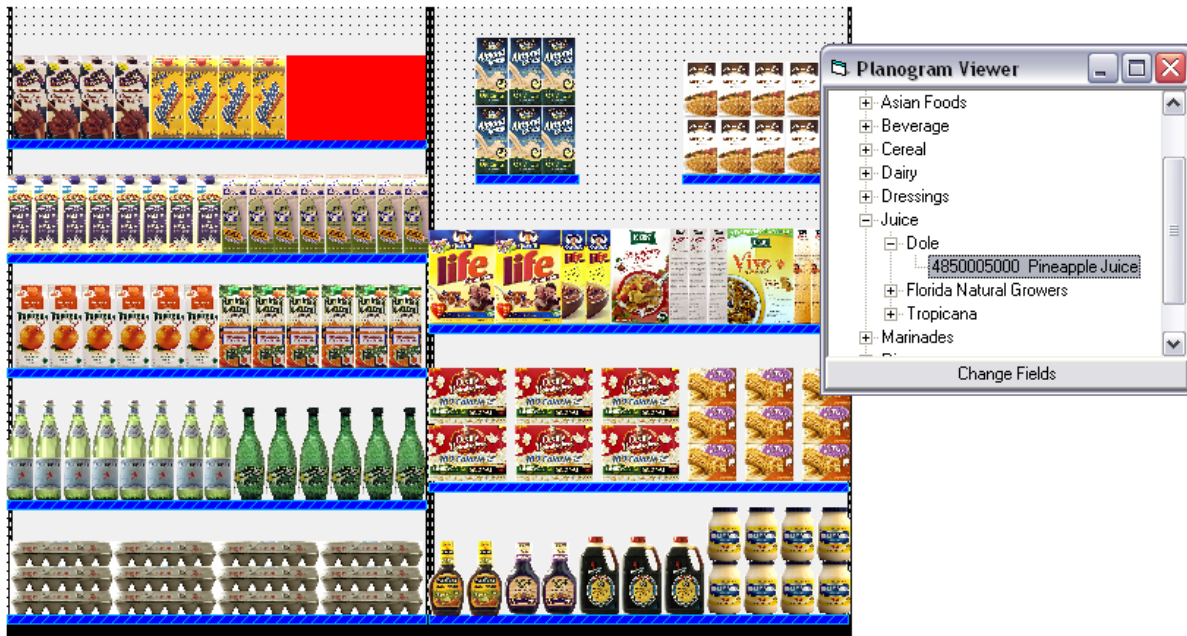


Clicking on any of the Vendor Names will show the products for that vendor. If we double-click on Dole, all Dole products are displayed, as shown in the figure below.



The 2 display fields chosen (UPC Code and Item Name in this case), are displayed.

If we click on the product in the Planogram Viewer, that product or products will be selected on the plan, as shown in the figure below.

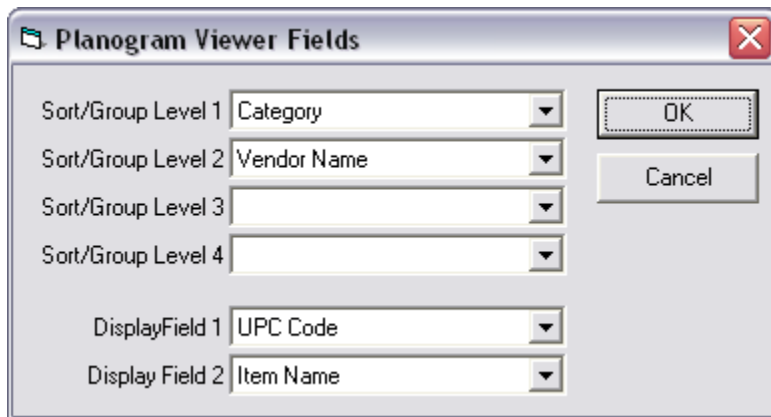


In the figure below, we show the UPC Code followed by the Item Name.

## Changing Planogram Viewer Fields

You can choose up to 4 sorted grouping and up to 2 fields to display. This refers to the Products area only.

When you click on the Change Fields button, the following window is displayed:



The image shows a dialog box titled "Planogram Viewer Fields" with a standard Windows-style title bar (minimize, maximize, close buttons). The dialog contains two main sections of dropdown menus. The first section, labeled "Sort/Group Level", has four rows: "Sort/Group Level 1" with "Category", "Sort/Group Level 2" with "Vendor Name", "Sort/Group Level 3" with an empty dropdown, and "Sort/Group Level 4" with an empty dropdown. The second section, labeled "DisplayField", has two rows: "DisplayField 1" with "UPC Code" and "Display Field 2" with "Item Name". To the right of these dropdowns are two buttons: "OK" and "Cancel".

Sort/Group Level	Field
Sort/Group Level 1	Category
Sort/Group Level 2	Vendor Name
Sort/Group Level 3	
Sort/Group Level 4	

DisplayField	Field
DisplayField 1	UPC Code
Display Field 2	Item Name

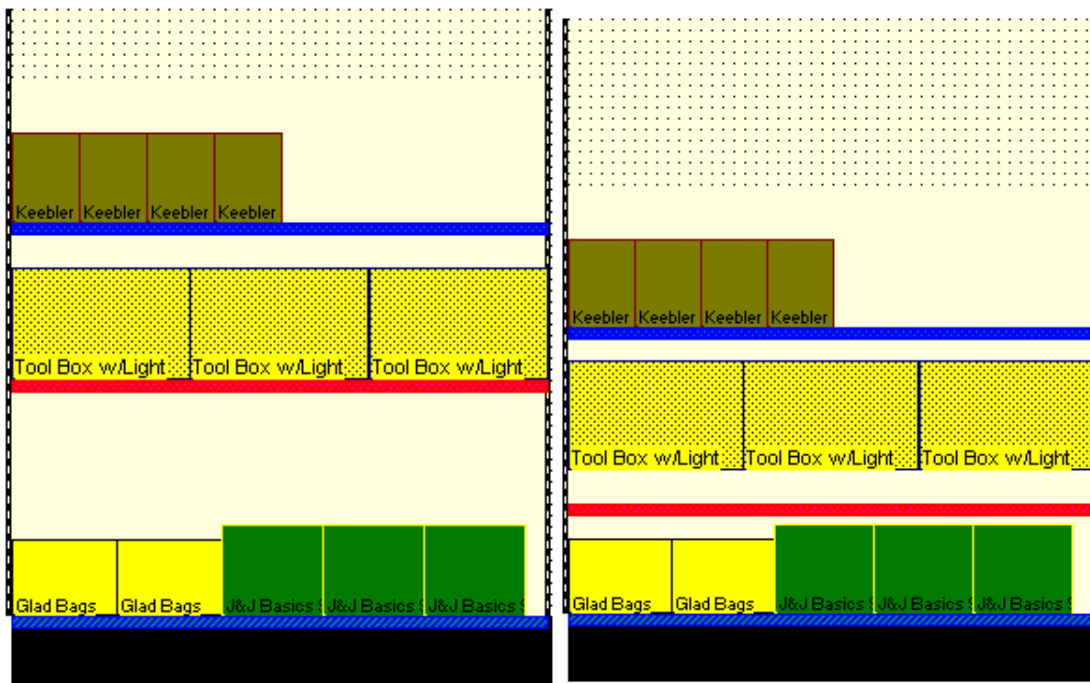
You can select any 4 grouping fields and any 2 fields to display.

## Automatic Placement Features

### Smart Shelf

Smart Shelf is a group of automatic features that function together. Smart Shelf is turned on and off by selecting it from the Tools Menu. These are the features that make up Smart Shelf.

1. **Smart Shelf** – checks the height, width and depth of each item added to the planogram to make sure it will fit on the selected shelf. A warning message will tell you which dimension is too large and the item will not be added. You can edit the shelf to accommodate the item or override Smart Shelf by shutting it off and adding the item manually. Exercise caution when adding items in manual mode since it is possible to place items where no real space exists.
2. **Auto Place** – This is an extremely useful feature that properly positions items for you. When placing items next to each other, it can be difficult to line them up properly using your mouse. Items may appear jagged and uneven. With the Auto Place feature, all you need to do is drag an item close to the desired location and release the mouse button. Auto Place will align the item against the next closest item.
3. **Auto Move** – This feature allows you to move a shelf together with any items already placed on that shelf. When Smart Shelf is turned off, the shelf will move but the items will remain in their original position.
4. **Auto Align** – This feature allows you to drag a shelf from one location to another, or from one segment to another. Smart Shelf will properly position the shelf between the vertical uprights.
5. **Auto Arrange** – This feature allows you to move several shelves while still maintaining the height specified in the Add Shelf dialogue box. In the figure below, 3 shelves were added each with a height of 12". With Smart Shelf on, shelf #2 was dragged upwards so that shelf #1 now has a height of 25". As shelf #2 was dragged, everything above it moved with it. Shelves #2 and #3 were repositioned but still have the original 12" height. The second figure shows the effect of dragging a shelf with Smart Shelf turned off. Only shelf #2 moved—the items on it, as well as shelf #3 remained in their original place.



**Figure 23. Dragging Shelves with Smart Shelf On (left) and Off (right)**

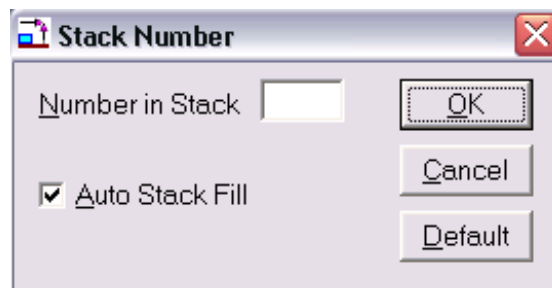
## Auto Center

This feature is always turned on and cannot be turned off. When adding or moving a shelf, auto center will position the shelf to the nearest available notch on the vertical uprights. When adding or moving peg items, auto center will position the item to the nearest available peg hole. This assures accuracy when building the physical display.

## Auto Stack Fill

Hot Button:                      Stack  
Menu:                              Item/Number in Stack

After executing the above command, the Stack Number dialogue box will open. When you add an item to a planogram, you are actually adding a facing of that item. A facing is a stack of items that fills a shelf or peg hook from the front edge to the back edge. By default, Auto Stack Fill is always on so that Shelf Logic® Enterprise Edition will place as many items as will fit on the shelf or peg hook. If the peg hook length or shelf depth is changed, the quantity in the stack will automatically recalculate.



**Figure 24. Stack Number**

**Number in stack** – This will override Auto Stack Fill and specify a stack number for the selected item.

**Auto Stack Fill** – A check mark indicates that the feature is active.

**OK Button** – Saves changes to the Stack Fill dialogue box.

**Cancel Button** – Exits without saving the stacking information.

**Default Button** – Makes the entered number the default Stack Fill for all new items added to the planogram. It will remain the default until a new default is selected or a new plan is opened. Each time a new planogram is started, the default will return to Auto Stack Fill.



# Rapid Item Placement

The RIP Processor is a powerful tool that lets you automatically place products on your plan. You can fill a shelf or peg area or the entire plan. The RIP Processor can even take a blank plan and, with a single mouse click, place all products and shelves needed. The RIP Processor lets you add products to the plan by specifying the product's UPC Code. The UPC Codes are put together into a list, or Queue. This list can then be placed on a shelf or a peg area with a single mouse click. You can even fill the entire place from the RIP Queue. Plans are filled from top left to bottom right.

The RIP Queue is also very useful for those companies that build actual shelf/peg displays to see how they work and then use Shelf Logic to create the planogram already built. The RIP Queue is perfect for this task. Just scan in each UPC Code on the actual display starting at the top left of the display and working down towards the bottom shelf.

There are two methods used to add items to the Queue.

## Part 1. Adding Items to the RIP Queue

There are two methods used to add items to the Queue.

### Method 1. Selecting from Item Listbox.

If you hold down the ALT Key and double-click on an item in the item listbox, that item will be added to the RIP Queue. You can add as many items as you want into the Queue.

### Method 2. Entering Item UPC Codes Manually

You can enter the UPC Codes for the desired items directly into the Queue. You can view the RIP Queue by selecting "RIP Processor" from the "Tools" menu.

Any items selected by ALT-double-clicking on the item listbox will appear in the RIP Queue and appear in the UPC Code textbox.

The RIP Queue is shown in the figure below.

UPC Code  
(one per line)

End of Shelf Code

Shelving

Shelf Thickness

Shelf Depth

Extra room Above Faces

Shelf ID

OK

Cancel

Load Queue

Save Queue

Clear Queue

☐ Fill Plan

☐ Create Shelves

In the textbox next to “UPC Codes”, you can enter the UPC Codes of the desired item, one on each line.

You can enter UPC Codes one at a time. After each UPC Code is entered, press the “Enter” Key to go to the next line, as shown below.

UPC Code  
(one per line)

07366256328

End of Shelf Code

Shelving

Shelf Thickness

Shelf Depth

Extra room Above Faces

Shelf ID

OK

Cancel

Load Queue

Save Queue

Clear Queue

☐ Fill Plan

☐ Create Shelves

Other ways to enter UPC Codes into the Queue.

- Paste a list of UPC Codes from other program or word processor
- Paste a column from a spreadsheet

- Notepad or similar format word processor file with one UPC Code per line
- Use Scan Gun to enter codes from an actual display

When you're done, one or more UPC Codes have been entered. This list is used to fill the plan, starting at top left. So the first UPC Codes in the Queue is placed on the top shelf in the first segment in the first shelf position on the left.

You can also put UPC Codes in the Queue by loading a Queue.

### ***Load Queue***

You can load a saved RIP Queue into the current Queue. When you click on the "Load List" button, you will be asked for the name and location of the saved Queue. When you enter the name, the "UPC Code" textbox will be filled with the contents of the saved Queue.

The RIP Queue file has an .RIP extension (such as ProductList.RIP) but the format of the RIP file is identical to a Notepad file, only it has an RIP extension. You can select a Notepad (.TXT extension) file for the RIP Queue, but when you click the Load Queue button, you will be prompted for an .RIP file. You can still select a .TXT file if you wish, as long as the TXT file has one UPC Code per line, just like the RIP file does.

### ***Save Queue List***

Once a list of UPC Codes has been entered, you can save this list to a text file (with an .RIP extension) that can be edited with notepad or similar. When you click on the "Save List" button, you will be asked for the name and location of the saved Queue. The RIP Queue file name has an extension of ".RIP".

### ***Clear Queue***

Clicking on this button will clear the current RIP Queue. You will be asked to verify before the Queue is cleared.

## Part 2. Placing Items from the RIP Queue

Once one or more items are in the RIP Queue, they can be placed onto the plan one at a time or in groups.

### Method 1. Placing Single Item from the RIP Queue

You can place a single item onto your plan from the RIP Queue by holding down the ALT Key when you click on the left mouse button. When you do this, the next item in the Queue will be placed directly under the current mouse position.

Each time you click the mouse when the ALT key is pressed, another item from the Queue is placed onto the plan. If you click the mouse without the ALT key pressed, it behaves as normal.

After the left mouse button is pressed, you can either release it to place the item where it is or just move the mouse and the newly placed item under it to a different location.

If you are placing an item in a peg area, it may move after you release the mouse button. This happens because the item needs to put its peg hole over the closest peg hook location.

### Method 2. Placing Multiple Items from the RIP Queue

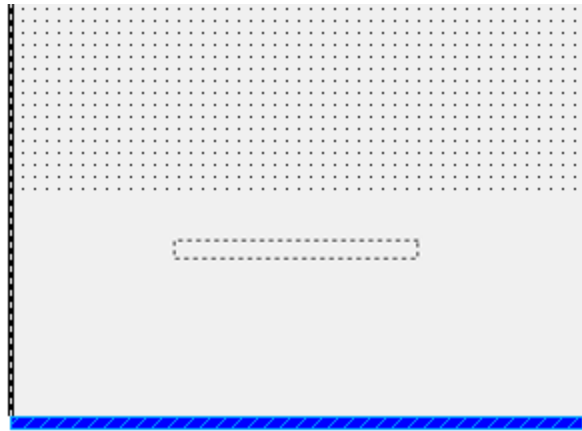
You can place multiple items on your place by using the mouse to indicate the area to be filled with items.

First you must hold down both the ALT and CONTROL Keys. Then click (the left mouse button) and drag the mouse left or right to create a select box and define the width of the area into which the items will be placed. Continue holding down the ALT and CONTROL keys while moving the mouse.

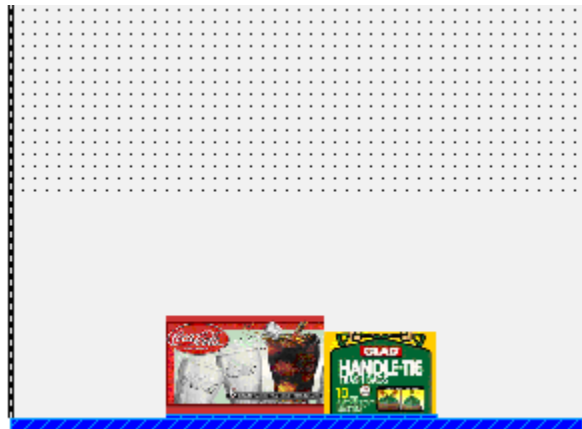
If you create the select box within a shelf area, the items in the Queue will be placed onto that shelf. If the select box is in a peg area, then the items will be placed in the peg area, with their tops aligned.

### Filling a Shelf Area from the RIP Queue

Let's fill a shelf with items from the RIP Queue. We'll do that by drawing our select box within any shelf area

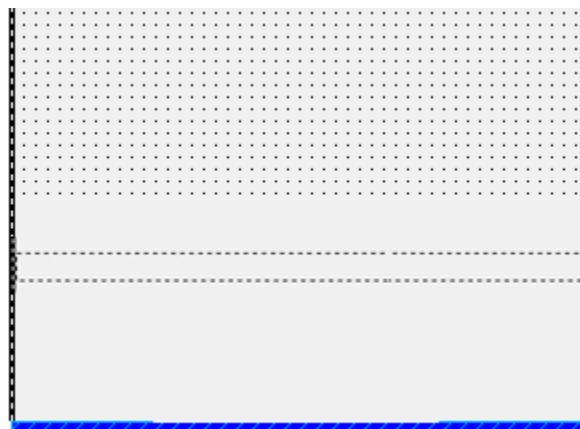


Here we can see the select box that's drawn. It's drawn within a shelf area so the items will be placed onto that shelf. The height of the box doesn't matter, only the width of the box. When you are finished dragging the mouse and the mouse button is released, the next items in the Queue will be placed across the span of the box. The item will start being placed at the left end of the box and end at or before the right end of the box.

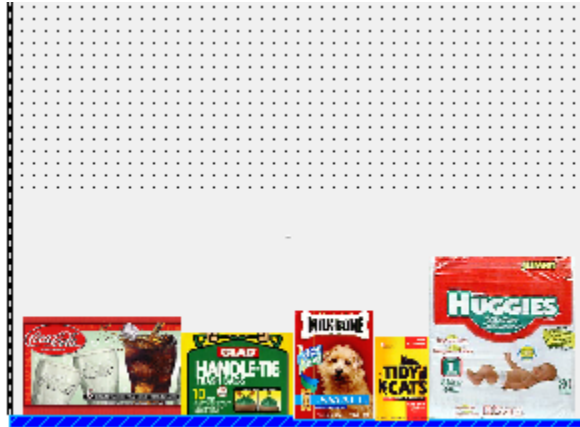


In this case two items from the Queue are placed on the shelf directly below the box.

Let's try this again but we'll fill an entire shelf at one time. We'll hold down the ALT and CONTROL keys and then click the left mouse button, starting at the left edge of the shelf and drag it to the right edge of the shelf, as shown below:



Since the top left of the select box is within the shelf area of the top shelf, the items will appear on that shelf, as shown below:



The items in the RIP Queue are placed on the shelf starting at the left and continuing until now more will fit on the shelf. You'll see there's some space left on the shelf because the next item in the Queue won't fit there.

You can then just continue to place items on the next shelf from the Queue until there are no more items left in the queue

### **Filling a Peg Area from the RIP Queue**

A peg area is filled in the same manner as a shelf area. Use the mouse to draw a select box indicating the margins but draw it in the peg area instead of in the shelf area. The items will fill the peg area from left to right according to the mouse drawn margins.

## Method 3. Filling a Plan with Items in the Queue

### ***Fill Plan Option***

The *Fill Plan* checkbox turns the *Fill Plan Option* on and off. When the checkbox is checked, the Fill Plan Option is on and the RIP Queue will fill the plan starting on the top shelf in the first segment working down to the bottom shelf. In fact, you can fill the entire plan by clicking the OK button on the RIP Queue window.

If you want more than one facing for the product, enter the UPC Codes more than once. For 4 facings (horizontally), enter the same UPC Code 4 times in the Queue.

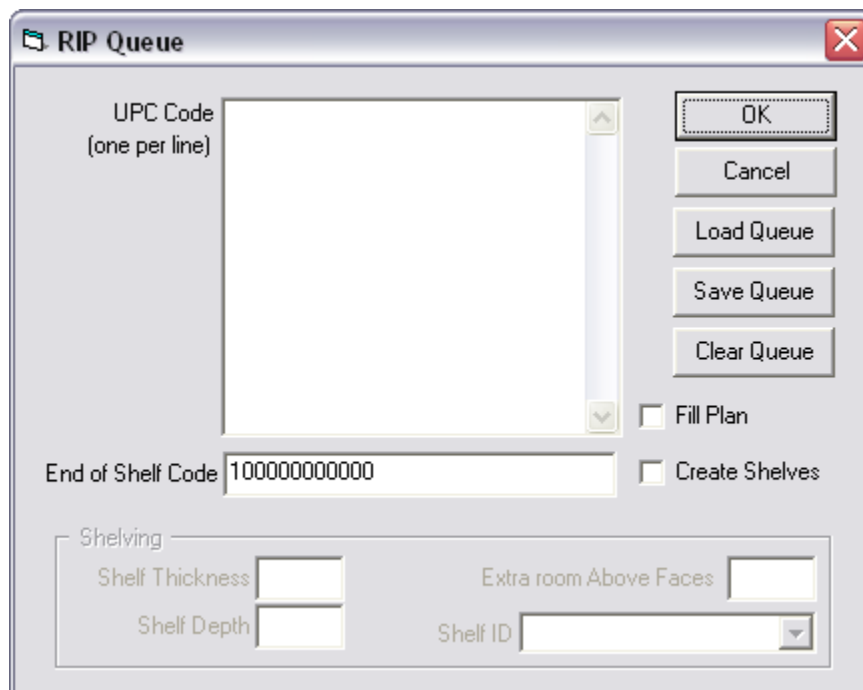
Product faces are placed on the shelves in groups so all of the same UPC is on the same shelf.

### ***End of Shelf Code***

Normally the product faces places will automatically wrap around to the next shelf down once the shelf is filled up. But you can create a 'manual' break in the Queue so that the product placing continues on the next shelf down.

This is done by declaring a 'fake' UPC Code for the break and then putting this UPC Code in the Queue where needed.

This fake UPC Code is called the *End of Shelf Code*.



The screenshot shows the 'RIP Queue' dialog box. It has a title bar with a close button. The main area contains a text input field labeled 'UPC Code (one per line)' with a vertical scrollbar. To the right of this field are five buttons: 'OK', 'Cancel', 'Load Queue', 'Save Queue', and 'Clear Queue'. Below the UPC Code field is a text input field labeled 'End of Shelf Code' containing the value '100000000000'. To the right of this field are two checkboxes: 'Fill Plan' and 'Create Shelves'. At the bottom, there is a section titled 'Shelving' containing four input fields: 'Shelf Thickness', 'Shelf Depth', 'Extra room Above Faces', and 'Shelf ID' (which has a dropdown arrow).

In the above figure, the End of Shelf Code is “100000000000”. Each time that UPC Code 100000000000 is encountered in the Queue, no more items will be placed on this shelf and the next items in the Queue are placed onto the next shelf down.

In the figure below we have products in the Queue. The “100000000000” is mixed in with the other products. When this Queue is run, 2 faces of UPC “4150880012” will be put on the topmost shelf in the leftmost position. Next to these faces go 2 faces of UPC “1600027519”.

Then we have the “100000000000” End of Shelf code. We now start filling the plan on the next shelf down. Next one face of UPC “1862783100” is placed in the leftmost position of the shelf below the top shelf. Then 2 faces of UPC “1862720001” are placed next to this face. Now we encounter the next End of Shelf Code of “100000000000” and so the next products in the Queue are placed on the next shelf down from this one (which would be the third shelf from top)

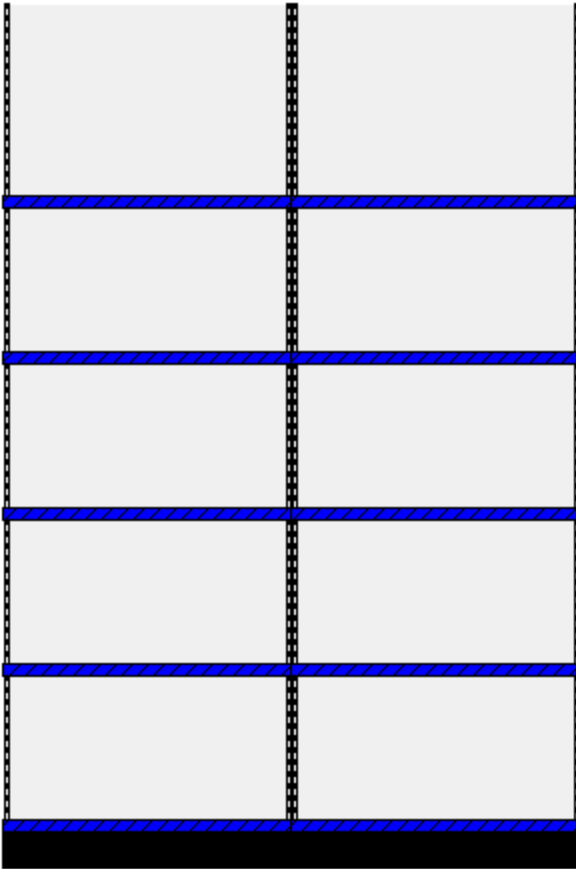
Notice that the *Fill Plan* checkbox is checked.

NOTE: Even with an End of Shelf Code, the product placement will still wrap around to the next shelf down if there isn’t enough room on the shelf for more products.

When you are using a scanner or scan gun to scan in UPC Code on an existing physical shelving or peg display, you can print out the *End of Shelf* UPC Code and then scan it in each time the end of the shelf is reached. This way the planogram will exactly match your physical display.

**Example:** Let’s start with a plan with shelves on it and we’ll fill those shelves using the RIP Processor. Here’s our empty plan with shelves:

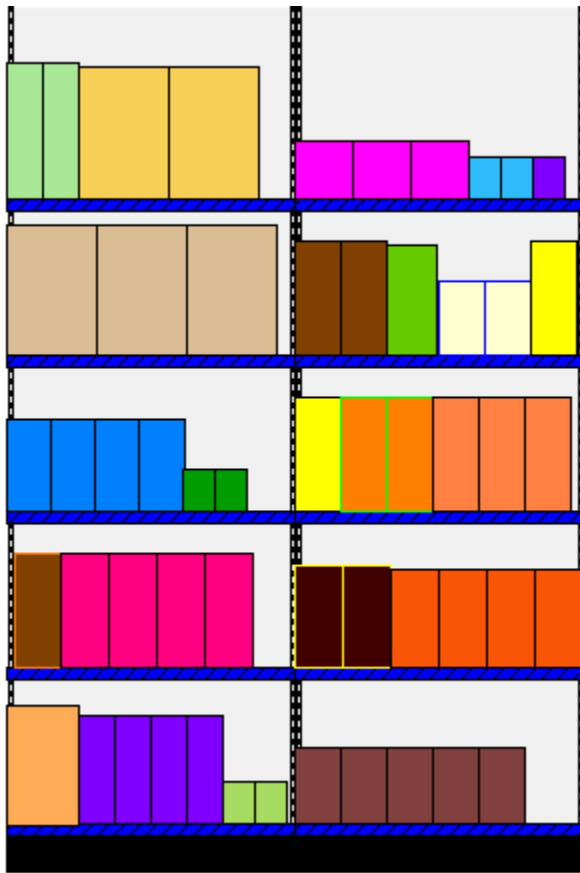




Here's the RIP Queue filled with UPCs.

We have the *Fill Plan* option checked but haven't entered an *End of Shelf Code* so the products will wrap around when they don't have any more room on the shelf.

When the OK button is clicked, the plan will look like the figure below:



## Create Shelves

When using the *Fill Plan* option, it is assumed that shelves are already on the plan. But if you check this option, you don't have to have shelves on the plan, the RIP Processor will place them where needed.

When you check the *Create Shelves* checkbox, several other options are made available, as shown highlighted in the figure below.

### ***Shelf Thickness***

Enter the thickness (in inches or cm) of each shelf that will be placed on the plan.

### ***Shelf Depth***

Enter the depth (in inches or cm) of each shelf that will be placed on the plan.

### ***Shelf Thickness***

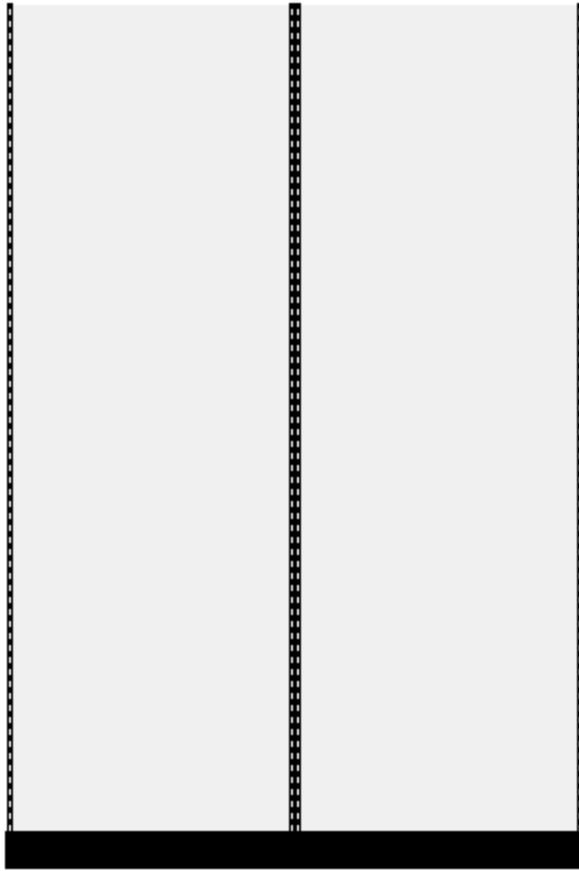
Enter the amount of extra room above the tallest product on the shelf.

### ***Shelf ID***

Instead of entering the shelf thickness and depth, you can select a shelf from the Shelf Library and that shelf will be used on the plan.

When the OK button is clicked, the entire plan, including shelves, will be created.

Example: Let's take an empty plan with no shelves on it and create the entire plan using the RIP Processor. Here's our empty plan with no shelves on it.



Here's the RIP Queue filled with products to go onto the plan. The Create Shelf option is used so shelves are added where needed. Each shelf will be one inch thick and 12 inches deep. There's one inch of extra space above the tallest product.

**RIP Queue**

UPC Code (one per line)

- 4150880012
- 4150880012
- 1600027519
- 1600027519
- 1862783100
- 1862720001
- 1862720001
- 1862720001
- 1862720001
- 1862720001
- 4157006827

OK

Cancel

Load Queue

Save Queue

Clear Queue

☒ Fill Plan

☒ Create Shelves

End of Shelf Code

Shelving

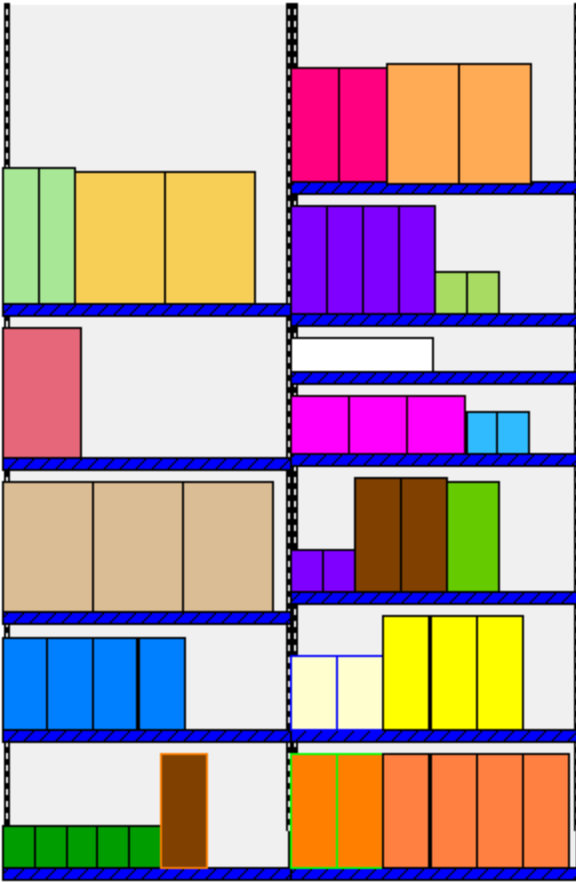
Shelf Thickness

Shelf Depth

Extra room Above Faces

Shelf ID

When run, the RIP Processor fills the plan and adds the shelves, as shown below.



NOTE: Notice that on the second shelf from the top in the first segment has only one product on it. This is because the next product has 3 faces and wouldn't fit on that shelf, so they were put onto the next shelf.

If the shelf is not wide enough to accommodate multiple faces of a single product, some product faces will be removed until they fit onto the shelf. You will be alerted when this happens. If you want to put multiple product faces onto two or more shelves, use the End of Shelf code to split up the faces so they fit onto the shelves.

## Changing Items in the RIP Queue

When the RIP Queue is displayed, you can add or delete UPC Codes from the Queue, or change their positions. You can save the Queue with the same or different name.

You can use the Load Queue button to load several UPC lists into the Queue. Each will be added to the end of the Queue.

## The Current UPC Pointer

The *Current UPC Pointer* is a ">" character that the program puts before the next item to be placed onto the plan from the Queue. If the ">" is absent, the first Current UPC Pointer points to the first UPC in the Queue.

The UPC Codes in the Queue are listed, one per line. On the 6<sup>th</sup> line, you see a “>” character before the UPC Code. This is the “current item pointer” and is placed before the next item in the Queue. Right now, the “current item pointer” is before UPC “1862720001”. This will be the next item placed from the Queue.

RIP Queue

UPC Code (one per line)

4150880012  
4150880012  
1600027519  
1600027519  
1862783100  
>1862720001  
1862720001  
1862720001  
1862720001  
4157006827

OK  
Cancel  
Load Queue  
Save Queue  
Clear Queue

☐ Fill Plan  
☐ Create Shelves

End of Shelf Code

Shelving

Shelf Thickness  
Shelf Depth  
Extra room Above Faces  
Shelf ID

You can change the “current item pointer” to point to any item on the list. Just click the mouse in the text box and erase the “>” character. Then place a “>” character before the item you want next in the Queue.

RIP Queue

UPC Code (one per line)

>4150880012  
4150880012  
1600027519  
1600027519  
1862783100  
1862720001  
1862720001  
1862720001  
1862720001  
4157006827

OK  
Cancel  
Load Queue  
Save Queue  
Clear Queue

☐ Fill Plan  
☐ Create Shelves

End of Shelf Code

Shelving

Shelf Thickness  
Shelf Depth  
Extra room Above Faces  
Shelf ID

In the Queue window above, we've erased the ">" on the 6<sup>th</sup> line and placed a ">" before the UPC on the first line. After you OK the window, the Queue will start from the top and UPC "4150880012" will be the next item to come out from the Queue.

When you use the "Load Queue" command to load a list of UPC Codes, the current item pointer always starts at the first UPC Code.

# Rapid Item Placement 2

There's another RIP Processor available with more placement options available. You can specify a specific number of products or faces to place. You can decide on the number of vertical or horizontal faces or let Shelf Logic automatically figure it out for you.

## The RIP2 Screen

The screenshot shows the 'RIP 2' window with the following elements:

- Field Used for RIP List:** A dropdown menu.
- Place By:** Radio buttons for 'Products' (selected) and 'Faces'.
- Buttons:** 'OK', 'Cancel', 'Load Queue', 'Save Queue', and 'Clear Queue' on the right side.
- List of Products to Place (1 per line):** A large text area for listing products.
- Qty to Place:** A vertical input field.
- Faces:** Two vertical input fields labeled 'W' and 'H'.
- Scroll Up:** Buttons for '<--', '<<--', and '|<--'.
- Scroll Dn:** Buttons for '-->', '-->>', and '-->|'.
- End of Shelf Code:** A text input field.
- Auto Fill:**
  - ☒ Use Auto Fill
  - Fill 1st:** 'Horizontally' (dropdown)
  - Fill 2nd:** 'Stack' (dropdown)
  - Fill 3rd:** 'Vertically' (dropdown)
  - Max Vertical Facings:** (dropdown)
  - Max Horizontal Facings:** (dropdown)
- If Product Faces Won't Fit:**
  - ☐ Don't Place
  - ☒ Place as Many as Possible
- Shelving:**
  - ☒ Create Shelves
  - Shelf Thickness:** (input field)
  - Shelf Depth:** (input field)
  - Extra Room Above Faces:** (input field)
  - Shelf ID:** (dropdown menu)



Let's go over the information you can enter and then we'll look at specific cases.

## **Field Used for RIP List**

This lets you choose the field you will use for the RIP list. You could have a list of UPC Codes, or a list of SKU Codes, etc. The field used must be unique for each product. For example, you can't have the same SKU Code for more than one product.

## **Place By**

The quantity to place can indicate a quantity of products or a quantity of product faces.

## **List of Products to Place**

This is a list of UPC Codes, SKU Codes, or whatever field chosen above. There should be one field value per line. You can paste information in from a spreadsheet, work processor or by using a scan gun.

Since you can specify the quantity of a product to place, you only need enter the product information (UPC Code, SKU Code, etc.) once.

## **Qty to Place**

This is the number of products or product faces to place. The *Place By* option select if product or product faces are used.

If you specify to place product faces, then the fill orders are used to determine if vertical or horizontal facings go first. When using Qty to Place for product facings, the fill order is always either vertical, then horizontal, then stack, or horizontal, then vertical, then stack.

If you specify the number of faces wide and high to use, the *Qty to Place* can be blank or zero.

## **Faces W H**

You can specify the number of horizontal and vertical faces to place. If the *Qty to Place* is zero, then the faces placed will be filled (depth wise) to the maximum.

The Faces Wide and Faces High parameters take precedence over a *Qty to Place* if the *Qty to Place* is for placing product faces. So if you have a *Qty to Place* of 12 product faces and you have a *Face W* of 2 and a *Face H* of 4, then there will be 8 product faces, not 12.

If a *Qty to Place* is specified (as the number of products to place, not the number of product faces to place) and it is less than the number of faces wide times the number of faces high, then all faces will be placed with a stack of 1.

If the *Qty to Place* is more than the number of faces wide times the number of faces high, then that quantity of product is distributed among the faces places.

For example, if the *Faces W* is 3 and the number of faces high is 2, and the *Qty to Place* is 14, then there will be 6 faces. Four of the six will have a stack of 2 and two faces will only have a stack of 1, for a total of 14 products.

Additional distribution of product stacks is done on the bottom faces first and works upwards, so in the example above, the faces with a stack of two are on the bottom.

If *Faces W* is entered and *Faces H* is not, and the *Qty to Place* (product faces) is more than 1, then the *Faces H* is calculated. For example, the *Qty to Place* is 8 and the *Faces W* is 2, then the *Faces H* will be set to 4.

The same is true if *Faces W* is not entered and *Faces H* and *Qty to Place* are.

A Face W and Face H can be entered for each product in the RIP list. If you use the Auto Fill option (which requires a blank Face W and Face H), you can still use Face W and Face H on one or more products to manually assign faces to them. All products without a Face W and Face H are automatically created according to the fill orders.

## Scroll Up/Scroll Dn

When there is more information than will fit in the RIP List window, you can use the Scroll Up and Dn buttons to scroll the list up or down.

-> Scroll Down 1  
->> Page Down  
->| Scroll Down to End  
<- Scroll Up 1  
<<- Page Up  
|<- Scroll to Top

## End of Shelf Code

Normally, if there's not enough room on a shelf for a product, it is put onto the next shelf. If you want to manually indicate when to put products onto the next shelf, you can create an *End of Shelf Code* (any number or letters) and then put that code into the RIP list where you want to move to the next shelf.

For example, lets say we enter an *End of Shelf Code* of "000000". We can put that into the RIP list where we want to move to the next shelf. Our RIP list might look like:

19283984

77898876  
000000  
64578332  
78765523

After products 19283984 and 77898876 are placed on a shelf, the *End of Shelf Code* is encountered and products 64578332 and 78765523 are placed on the next shelf.

## Auto Fill

The Auto Fill feature lets you automatically determine the number of product faces placed and how many are placed vertically and horizontally. The Auto Fill feature only works if the *Faces W* and *Faces H* are blank (or zero) and you specify a *Qty to Place*.

Checking the Use Auto Fill checkbox will let you use this feature.

### Fill 1<sup>st</sup>

This lets you specify how to begin placing product faces. If you specify Vertically, then product faces will be placed vertically until the desired vertical number is reached or until there is no more shelf height.

If you specify Horizontally, then products will be placed across the shelf until the desired number is reached or until there is no more shelf space.

If you specify Stack, then products will be placed one behind the other until the desired number is reached or until the maximum number of stacking possible is reached.

If more faces are still needed, the Fill 2<sup>nd</sup> parameter is used.

### Fill 2<sup>nd</sup>

This determines the second fill order, used if the first fill doesn't place the requested products.

### Fill 3<sup>rd</sup>

This determines the third fill order, used if the first and second fills don't place the requested products.

Auto Fill works whether the *Qty to Place* is set to place products or product faces.

## **Examples:**

Let's look at some examples. (*Faces W* and *Faces H* must be blank or zero)

*Qty to Place* is set to 12

*Place By* is set to products

Fill 1<sup>st</sup> is set to Vertically

Fill 2<sup>nd</sup> to set to Stack

Fill 3<sup>rd</sup> is set to Horizontally

When the fill process begins, vertical faces will be created. The existing shelf height allows for 2 vertical faces. Then fill order 2, stacking, begins. The shelf and product depths allow for a stack of 3. So we have 2 vertical faces with 3 products in each face. We have a Qty to Place of 12 so we now need fill order 3 and horizontal faces are created. One additional horizontal face is created (which creates another set of 2 vertical faces) and that additional set of faces also has 6 products, for a total of 12 products.

If the additional horizontal face wouldn't fit on the shelf, the product faces would be moved to the next shelf.

Let's try another example.

*Qty to Place* is set to 5

*Place By* is set to products

Fill 1<sup>st</sup> is set to Horizontally

Fill 2<sup>nd</sup> to set to Stack

Fill 3<sup>rd</sup> is set to Horizontally

When the fill process begins, horizontal faces will be created, in this case 5 faces. Each face will have a stack of one product. That matches the desired Qty to Place of 5 so we're done.

Let's take the above example but say only 3 product faces will fit on the shelf. That leaves 2 more products. Since the second fill order is Stack, 2 of the three horizontal faces will have a stack of 2 and one face will have a stack of one, for a total of 5.

Let's take the above example again and say the only one horizontal face will fit on the shelf. The second order is stack so will fill up the product faces. Let's say the only 3 faces will fit in a stack. That leaves 2 more. So we use our 3<sup>rd</sup> fill order, vertically. We create a second vertical face and put 2 products in that stack. We now have a face with 3 stacked and a face with 2 stacked. If, for some reason, a second vertical face couldn't be created, all faces would move to the next shelf.

## **Max Vertical Faces**

By entering a maximum vertical facing, you can limit the number of vertical faces automatically placed. This has no effect if the *Face H* amount is specified.

## **Max Horizontal Faces**

By entering a maximum horizontal facing, you can limit the number of horizontal faces automatically placed. This has no effect if the *Face W* amount is specified.

## **If Product Faces Won't Fit**

This lets you specify what to do if a product is too large to fit onto an entire shelf.

### ***Don't Place***

Choose this and the product faces won't be placed at all.

### ***Place as Many as Possible***

Choose this and as many products as will fit on the entire shelf will be placed.

# Shelving

You can automatically create shelves as the product as placed onto the plan. You can only do this by limiting the number of vertical facing. This is done by specifying a *Face H* or a *Max Vertical Facing*.

## Create Shelves

Check this to place shelves as well as products.

## ***Shelf Thickness***

This is the thickness, in inches or cm, of the shelves to be placed.

## ***Shelf Depth***

This is the depth, in inches or cm, of the shelves to be placed.

## ***Extra Room Above Shelves***

This is the space, in inches or cm, between the highest product face and the shelf above.

## ***Shelf ID***

Use this to indicate you want to use shelves from the library with this Shelf ID.

# Examples

## **Example 1 – Manually Place Faces**

Qty to Place = 0

Face W = 4

Face H = 2

Auto Fill can be on or off

This will place 2 vertical and 4 horizontal faces, each with the stack amount filled.

## **Example 2 – Manually Place Faces with Quantity**

Qty to Place = 24

Place by = Products

Face W = 4

Face H = 2

Auto Fill can be on or off

This will place 2 vertical and 4 horizontal faces, each with the stack amount set to 3, for a total of 8 faces and 24 products

### **Example 3 – Manually Place Faces with Quantity**

Qty to Place = 22

Place by = Products

Face W = 4

Face H = 2

Auto Fill can be on or off

This will place 2 vertical and 4 horizontal faces, each with the stack amount set to 3 for 6 faces and set to 2 for 2 faces, for a total of 8 faces and 22 products

### **Example 4– Automatically Place Product Faces**

Qty to Place = 24

Place by = Faces

Face W = blank

Face H = blank

Auto Fill = on

Fill 1<sup>st</sup> = Vertically

Fill 2<sup>nd</sup> = Horizontally

Fill 3<sup>rd</sup> = Stack

This specifies the number of faces to place. This will start placing product facings vertically. In this case, 3 vertical faces will fit. We move to Fill order 2, which creates horizontal facings, in this case, 8 horizontal facings for a total of 24 facings. The stack is filled to the maximum on all facings. If the 8 horizontal faces wouldn't fit on the shelf, the facings are moved to the next shelf. If the next (empty) shelf isn't big enough for the 8 facings, you have the option of not placing the products or placing as many as will fit.

### **Example 5– Automatically Place Products**

Qty to Place = 24

Place by = Products

Face W = blank

Face H = blank

Auto Fill = on

Fill 1<sup>st</sup> = Vertically

Fill 2<sup>nd</sup> = Stack

Fill 3<sup>rd</sup> = Horizontally

This specifies the number of products to place. This will start placing products vertically. In this case, 3 vertical faces will fit. We move to Fill order 2, which attempts to fill the stack to maximum, which in this case is 4. So far we have 3 facings of 4 for a total of 12. We now go to fill order 3 and start to create horizontal facings. One additional horizontal facing will create another vertical set of 3 facings, each with a stack of 12, for a total of 24 products placed, so we're done.

Let's try the above example but with a Qty to Place of 25. In this case, we will need one more set of horizontal facings, giving us a total of 9 facings. We will distribute the 25 products amongst these faces. So 7 facings will have a stack of 3 and 2 facings will have a stack of 2, for a total of 25 products.

In the examples above, we are referring to a single product placement. Using RIP 2, we are placing multiple products. Each product can have it's own quantity and or number of facings wide and high.

Let's take an example, shown in the figure below.

The screenshot shows the RIP 2 software interface. At the top, there's a title bar with 'RIP 2' and a close button. Below the title bar, there's a section for 'Field Used for RIP List' with a dropdown menu set to 'UPC Code'. To the right, there's a 'Place By' section with two radio buttons: 'Products' (selected) and 'Faces'. On the far right, there are buttons for 'OK', 'Cancel', 'Load Queue', 'Save Queue', and 'Clear Queue'.

The main area contains a table with the following columns: 'List of Products to Place (1 per line)', 'Qty to Place', 'Faces W', 'Faces H', and 'Scroll Up'. The table has five rows of data:

List of Products to Place (1 per line)	Qty to Place	Faces W	Faces H	Scroll Up
1600027519	6	0	0	<--
1630015114	8	0	0	<--
1862720001	12	0	0	<<--
3450014000	26	8	2	<--
4157006827	24	0	0	<--
4190007135	12	0	0	<--

Below the table, there's a 'Scroll Dn' section with buttons for '>--', '>>', and '>|'. To the left of these buttons is an 'End of Shelf Code' input field.

The 'Auto Fill' section is below the 'End of Shelf Code' field. It has a checked checkbox for 'Use Auto Fill'. Below this, there are three dropdown menus for 'Fill 1st' (set to 'Horizontally'), 'Fill 2nd' (set to 'Stack'), and 'Fill 3rd' (set to 'Vertically'). To the right of these are two dropdown menus for 'Max Vertical Facings' and 'Max Horizontal Facings'. Below these is a section for 'If Product Faces Won't Fit' with two radio buttons: 'Don't Place' and 'Place as Many as Possible' (selected).

The 'Shelving' section is at the bottom. It has a checkbox for 'Create Shelves' which is unchecked. Below this are four input fields: 'Shelf Thickness', 'Shelf Depth', 'Extra Room Above Faces', and 'Shelf ID' (which is a dropdown menu).

The RIP list is a list of UPC Codes. Qty to Place is done by products. Auto Fill is being used and the fill order is Horizontally, Stack and then Vertically.

The first UPC Code in the list is 1600027519 and 6 products are to be placed.  
The next UPC Code is 1630015114 and 8 products are to be placed.

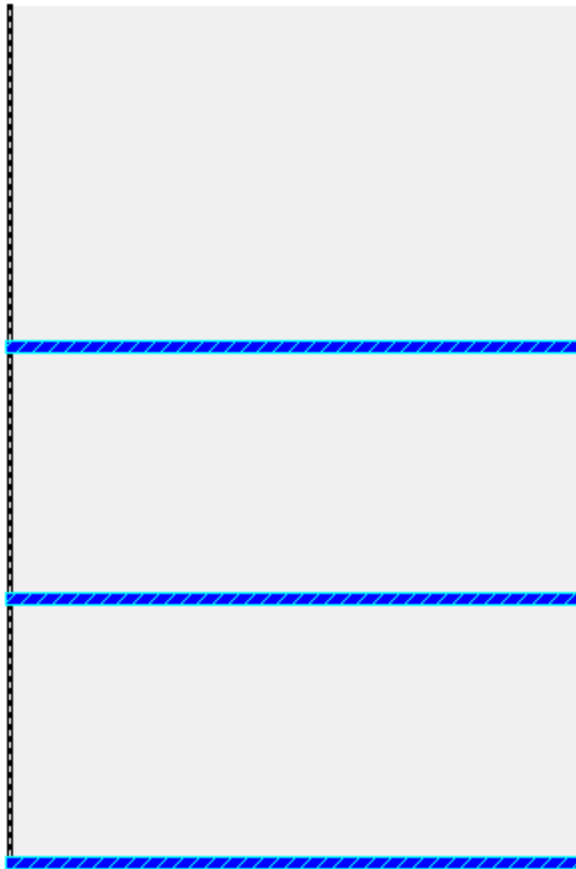


Then 12 products of UPC 1862720001 are placed.

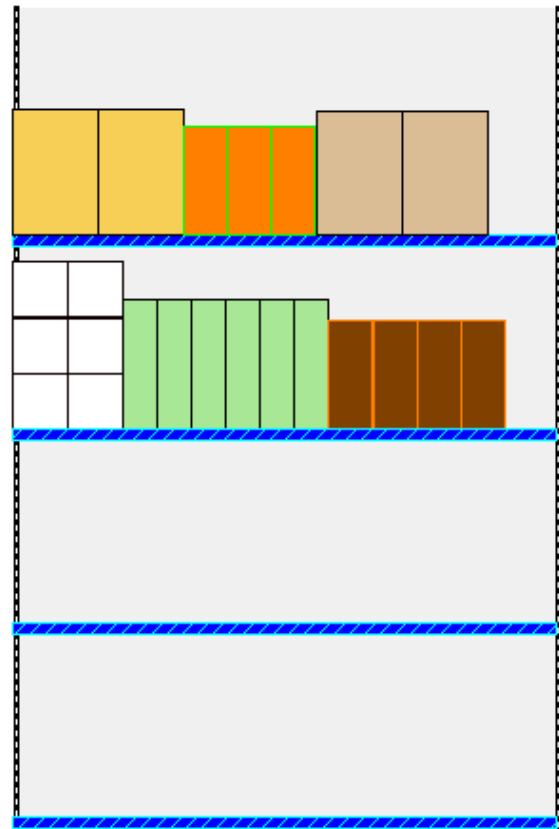
When UPC 3450014000 is placed, we specify a Face W of 8 and a Face H of 2. So 16 faces are placed, 2 high and 8 wide. The Qty to Place is 26, so that amount is distributed amongst the 16 faces.

This is followed by 24 products of UPC 4157006827 and 12 products of UPC 4190007135.

Using the above information, here's how different fill orders affect the outcome. On the left is the plan with just shelves. On the right is the finished plan according to the RIP 2 parameters.

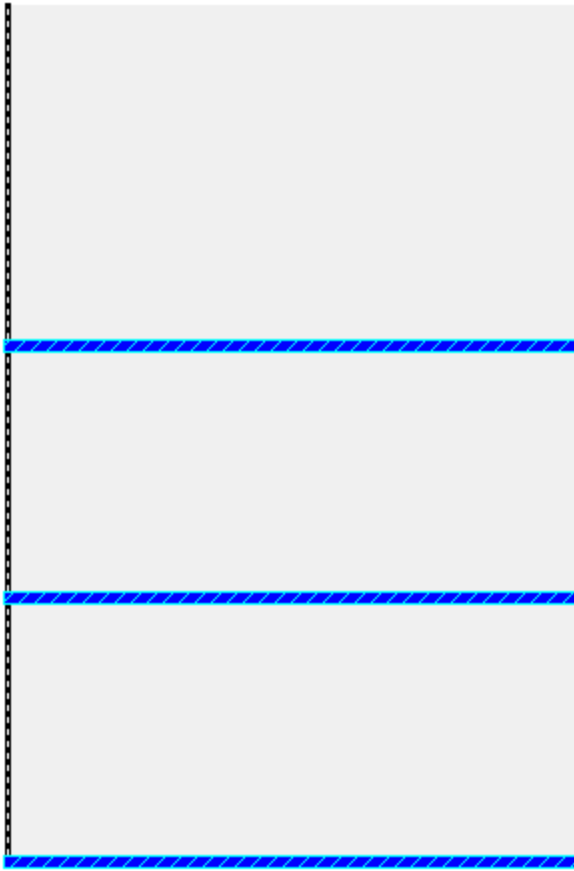


Fill 1<sup>st</sup> = Vertically

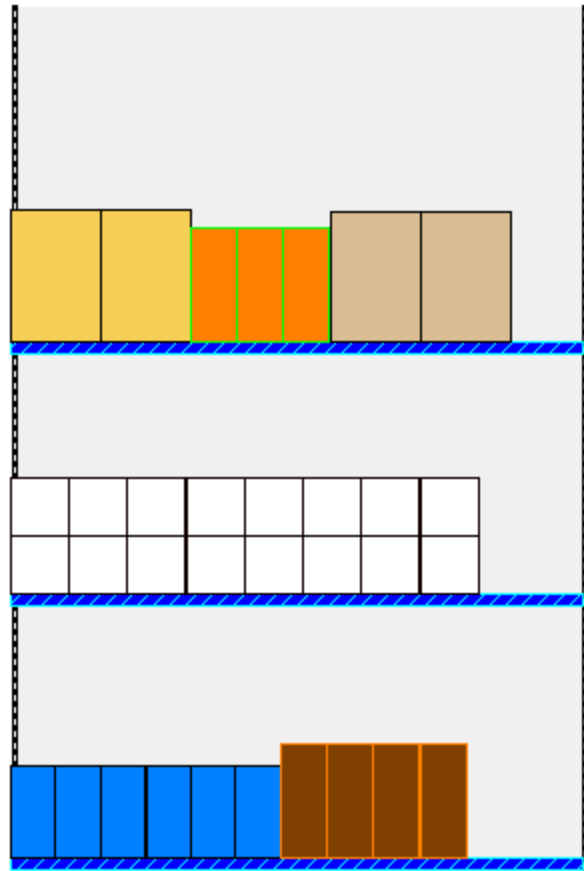


Fill 2<sup>nd</sup> = Stacked

Fill 3<sup>rd</sup> = Horizontally

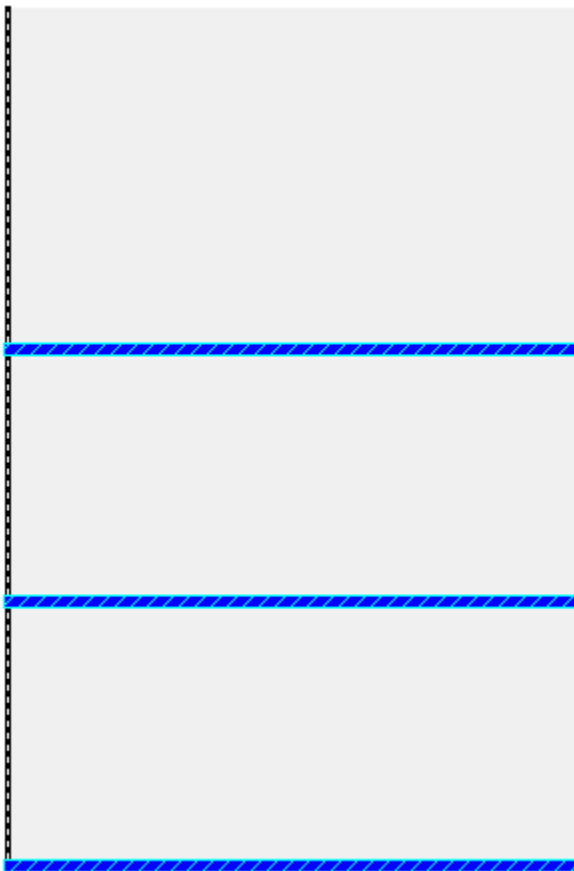


Fill 1<sup>st</sup> = Horizontally

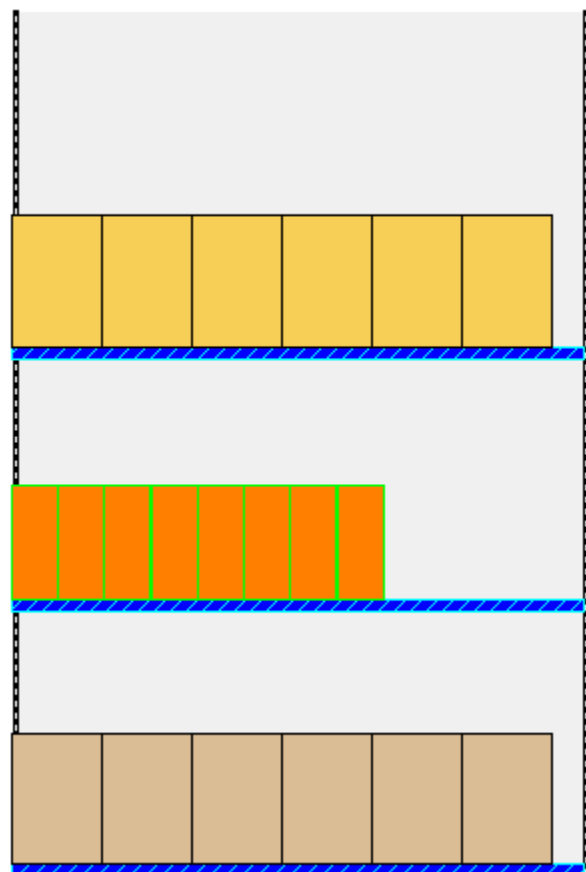


Fill 2<sup>nd</sup> = Stacked

Fill 3<sup>rd</sup> = Vertically

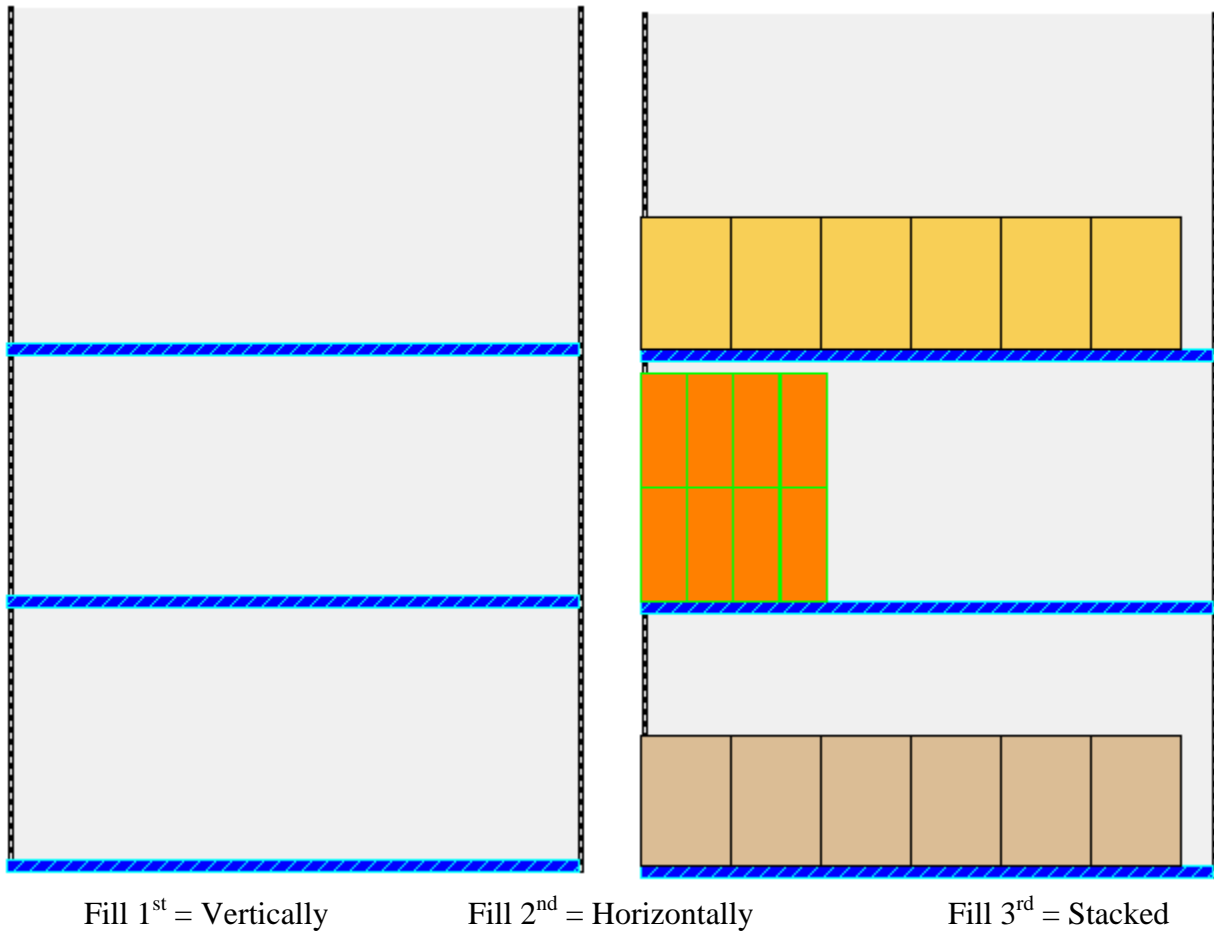


Fill 1<sup>st</sup> = Horizontally



Fill 2<sup>nd</sup> = Vertically

Fill 3<sup>rd</sup> = Stacked



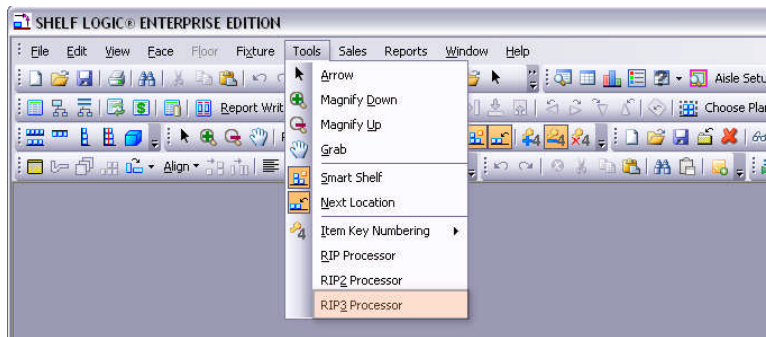
In the last 2 plans, not all product faces were placed on the plan because there was not enough shelf space.

# Rapid Item Placement 3

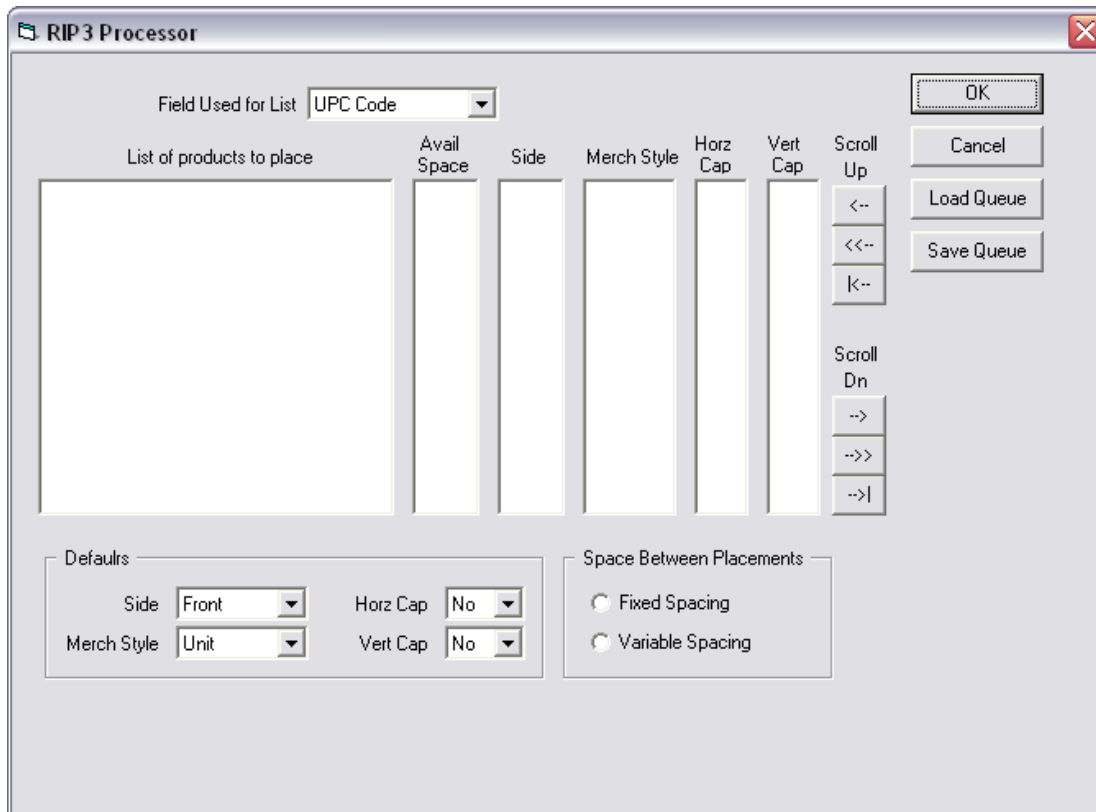
Our third RIP fills up a plan based not on the number of products as the other RIP processors, but on the amount of space allotted for each product.. So Product A would get 6 inches of shelf space, Product B would get 10 inches of shelf space, and so on. In addition, you can specify if you want the additional available space to be capped.

## Using the RIP3 Processor

Start the RIP3 Processor from the Tools Menu as shown below.



You will then see the RIP3 Processor screen, shown below.



The following information needs to be entered

## Field Used for List

The list of products to place can be listed by any field, not just by UPC Codes. However, the field used should have data that is unique. If you use the Item Name field and you have an item on the list that has a duplicate, the program won't know which Item Name to use.

In the example below, we use the Item Name as the field used for the list.

The screenshot shows the 'RIP 3 Processor' dialog box. At the top, 'Field Used for List' is set to 'Item Name'. Below this is a table titled 'List of products to place' with columns: Avail Space, Side, Merch Style, Horz Cap, and Vert Cap. The first row contains 'Perrier With Lime', an empty 'Avail Space' cell, 'Front', 'Unit', 'No', and 'No'. To the right of the table are buttons for 'OK', 'Cancel', 'Load Queue', and 'Save Queue'. Below the table are 'Scroll Up' and 'Scroll Dn' buttons with arrows. At the bottom, there are 'Defaults' and 'Space Between Placements' sections. The 'Defaults' section has dropdowns for 'Side' (Front), 'Merch Style' (Unit), 'Horz Cap' (No), and 'Vert Cap' (No). The 'Space Between Placements' section has radio buttons for 'Fixed Spacing' and 'Variable Spacing'.

List of products to place	Avail Space	Side	Merch Style	Horz Cap	Vert Cap
Perrier With Lime		Front	Unit	No	No

## List of products to place

This is the list of products to be placed. Above we have specified to use the Item Name field so the first product in the list shows the product's item name.

You can enter products manually, each on its own line, or you can cut & paste information into it from Excel, etc. You could use Excel to sort the products the way you want and then cut & paste the Item Name column (or any field column) into this.

Field Used for List: UPC Code

List of products to place

	Avail Space	Side	Merch Style	Horz Cap	Vert Cap
Perrier With Lime					
Pellegrino					
Tropicana OJ					
Orange Juice					
Pineapple Juice					
Yoo-Hoo					
Quaker Life Cinnamon					
Vive Cereal					
Hellmann's Mayonaise					
Sweet & Salty Snack Bars					

Scroll Up: <-- <<-- K--

Scroll Dn: --> -->> -->|

OK Cancel Load Queue Save Queue

Defaults

Side: Front Horz Cap: No

Merch Style: Unit Vert Cap: No

Space Between Placements

☐ Fixed Spacing ☐ Variable Spacing

In the example above, we have cut & paste a column from a spreadsheet into the “List of products to place” text field.

## Avail Space

This is the amount of space, in inches or cm, allotted for the product.

## Side

This is the side, Front, side or top, that the product will be when placed. Enter “F” for front, “S” for side or “T” for top. The default side is specified in the Defaults frame

Defaults

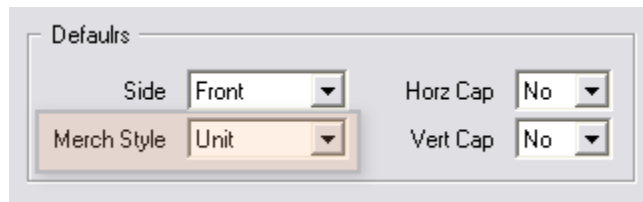
Side: Front Horz Cap: No

Merch Style: Unit Vert Cap: No

So when one or more products are entered into the list, the side field is automatically filled in with the side default.

## Merch Style

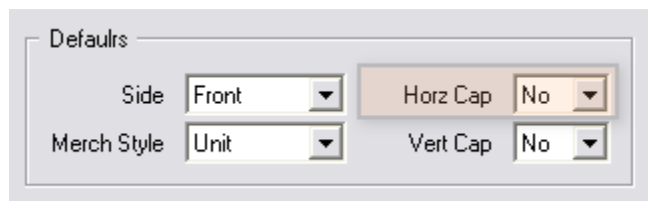
This is the merchandising style for this product. Enter “U” for Unit, “T” for Tray, “C” for Case or “D” for Display. The default merchandising style is entered for you and is specified in the Merch Style default in the Defaults frame.



The image shows a software interface titled "Defaults". It contains four dropdown menus arranged in a 2x2 grid. The first row has "Side" set to "Front" and "Horz Cap" set to "No". The second row has "Merch Style" set to "Unit" (highlighted with an orange border) and "Vert Cap" set to "No".

## Horz Cap

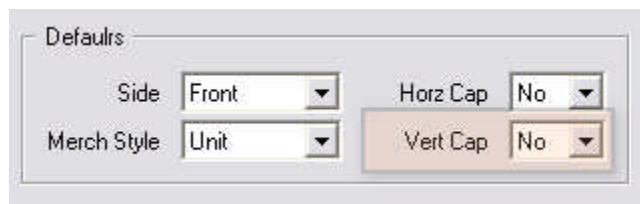
This determines if you want to horizontally cap the product if there's enough room. Enter “Y” for Yes or “N” for no. The default is entered for you and is specified in the Horz Cap default in the Defaults frame.



The image shows the same "Defaults" interface as before. In this view, the "Horz Cap" dropdown menu is highlighted with an orange border, and it is set to "No". The other settings remain the same: "Side" is "Front", "Merch Style" is "Unit", and "Vert Cap" is "No".

## Vert Cap

This determines if you want to vertically cap the product if there's enough room. Enter “Y” for Yes or “N” for no. The default is entered for you and is specified in the Vert Cap default in the Defaults frame.



The image shows the same "Defaults" interface. In this view, the "Vert Cap" dropdown menu is highlighted with an orange border, and it is set to "No". The other settings remain the same: "Side" is "Front", "Merch Style" is "Unit", and "Horz Cap" is "No".

## Space Between Placements

This determines the spacing between products. If there is leftover space after a product has been placed, then choosing Variable Space will put the next product right after this one. If Fixed Spacing is chosen, the then leftover space is left empty until the start of the next product.

## Scroll Up/Down

If you have more product than will fit at one time, you will need to scroll. Click on the scroll up or scroll down button so all columns scroll at the same time.

## RIP3 Example

In the RIP3 window shown below, we have filled in the information needed to create a planogram. We have chosen to list the product by their item name and have a list of 10 products to place.

The screenshot shows the RIP3 Processor window. At the top, there is a dropdown menu labeled 'Field Used for List' with 'Item Name' selected. Below this is a table titled 'List of products to place'. The table has columns for 'Avail Space', 'Side', 'Merch Style', 'Horz Cap', and 'Vert Cap'. The products listed are Perrier With Lime, Pellegrino, Tropicana OJ, Orange Juice, Pineapple Juice, Yoo-Hoo, Quaker Life Cinnamon, Vive Cereal, Hellmann's Mayonaise, and Sweet & Salty Snack Bars. To the right of the table are buttons for 'OK', 'Cancel', 'Load Queue', and 'Save Queue'. Below the table are two sections: 'Defaults' and 'Space Between Placements'. The 'Defaults' section has dropdowns for 'Side' (Front), 'Merch Style' (Unit), 'Horz Cap' (No), and 'Vert Cap' (No). The 'Space Between Placements' section has radio buttons for 'Fixed Spacing' and 'Variable Spacing' (which is selected). There are also scroll buttons for 'Scroll Up' and 'Scroll Dn'.

Field Used for List	Avail Space	Side	Merch Style	Horz Cap	Vert Cap
Perrier With Lime	12	Front	Unit	No	No
Pellegrino	12	Front	Unit	No	No
Tropicana OJ	16	Front	Unit	No	No
Orange Juice	8	Front	Unit	No	No
Pineapple Juice	24	Front	Unit	No	No
Yoo-Hoo	24	Front	Unit	No	No
Quaker Life Cinnamon	30	Front	Unit	Yes	No
Vive Cereal	18	Front	Unit	Yes	No
Hellmann's Mayonaise	20	Front	Unit	No	No
Sweet & Salty Snack Bars	28	Front	Unit	Yes	No

For each product, we have assigned the space allotted. Since the plan we have has 48 inch shelves, we should have the avail space total up to 48 inches for each group. Above, the 1<sup>st</sup> and 2<sup>nd</sup> products have been given 12 inches of space, the next product 16 inches and the product after that is 8 inches. These 4 product total up to 48 inches so will fill the shelf totally.

If the space given won't fit on the shelf, it goes to the next shelf. For example, if we gave the 4<sup>th</sup> product 12 inches of space instead of 8 inches, it wouldn't fit on the shelf and so would go onto the next shelf below. If the 4<sup>th</sup> product was given less than 8 inches, then the 5<sup>th</sup> product would attempt to go on the shelf and since the 5<sup>th</sup> product needs 24 inches, it will go onto the next shelf and the shelf above will have unassigned space.

Each product is placed on its front and using the unit merchandising style. Some of the products will be capped horizontally but no products are to be vertically capped.





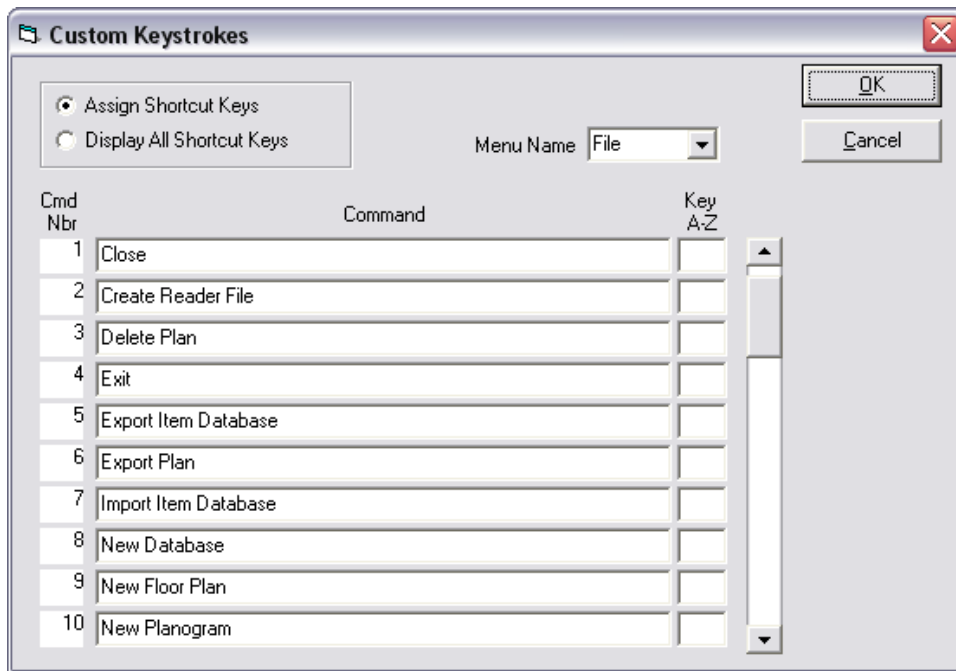
The plan on the left is empty except for shelves. When we run the RIP3 processor as filled in above, the plan will look like the one on the right. Each product is filled in according to the space allotted.

# Keystroke Manager

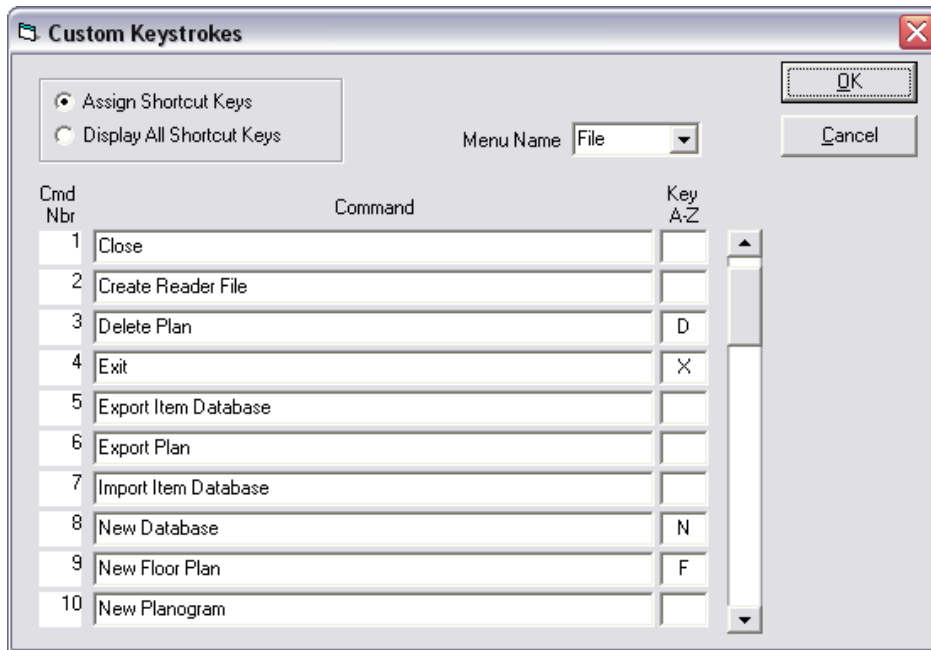
The Keystroke Manager will let you assign any menu command to a key. This key is the keyboard key without control, Shift or Alt being pressed.

## Using the Keystroke Manager

From the Tools menu, select “Keystroke Manager” and you will see the following window:



This window has all of the commands for each menu and lets you assign a key (from A to Z) to the menu command. The “Menu Name” combobox lets you select which menu to use. Then all of the commands on that menu are listed. You can scroll down to see more menu commands. For each menu command, you can enter the key that will activate that command.

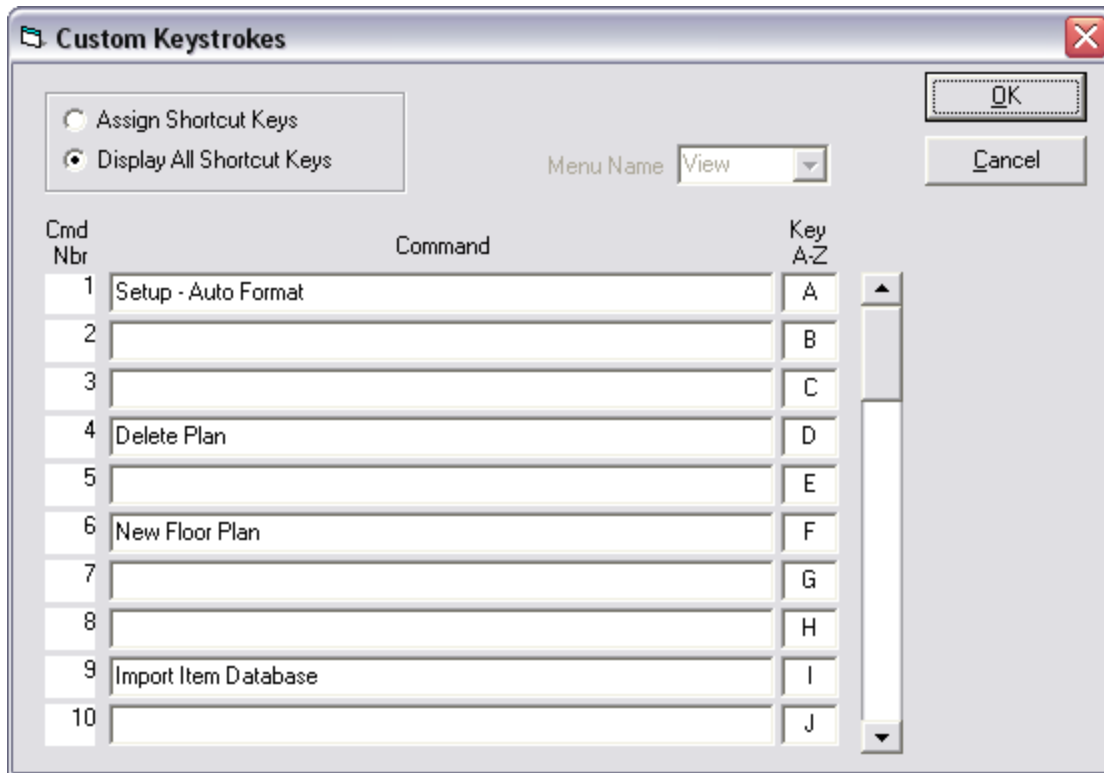


In the figure above, we've assigned the "Delete Plan" menu command to the "D" key, the "Exit" command to the "X" key, "N" for the "New Database" command and "F" for "New Floor Plan".

Pressing the "D" key will delete a plan. Not Control-D, Shift-D or Alt-D, just the "D" key by itself.

## Listing All of the Assigned Keys

You can see the currently assigned keys by clicking on the "Display All Shortcut Keys" will show the keys from A to Z and the command, of any, assigned to that key. This is shown in the figure below.



We can see that the “A” key has been assigned to a menu command. The “B” and “C” keys have not been assigned, the “D” key is assigned, and so on.

Clicking on the “Assign Shortcut Keys” button will again let you assign the keys to commands.

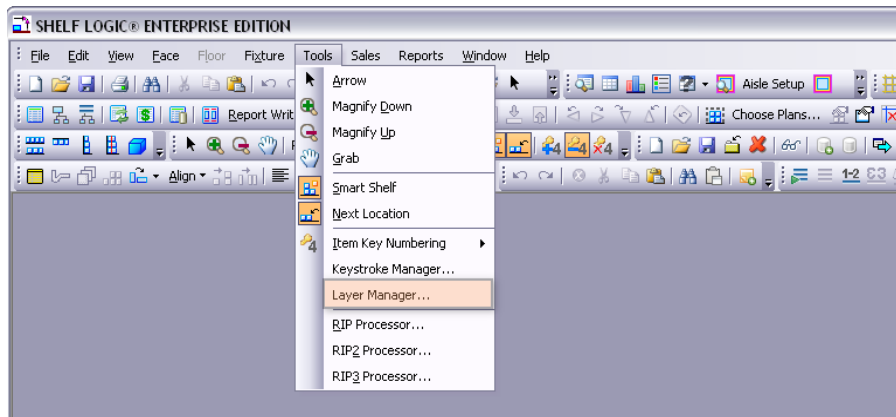
When finished assigning keys, click the OK button to save these keys. After this, just pressing the appropriate key will activate that menu command. The key can be upper or lower case, but can’t be entered along with the CONTROL key.

# Layer Manager

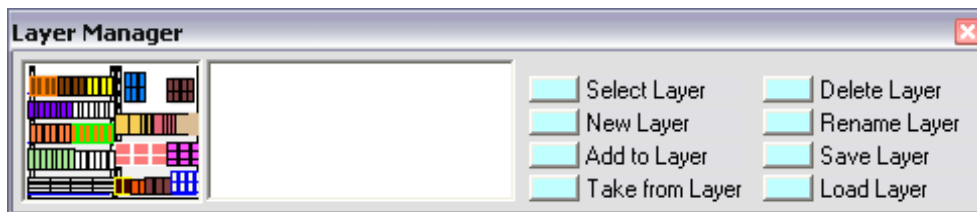
The Layer Manager will let you select faces and save them as a layer. You can save one or more layers and add or remove faces from a layer. A layer is a list of faces for a particular plan. You can have multiple layers, each with its own list of faces, for a plan. When you switch plans, a different set of layers are used (if they have been previously defined.)

## Using the Layer Manager

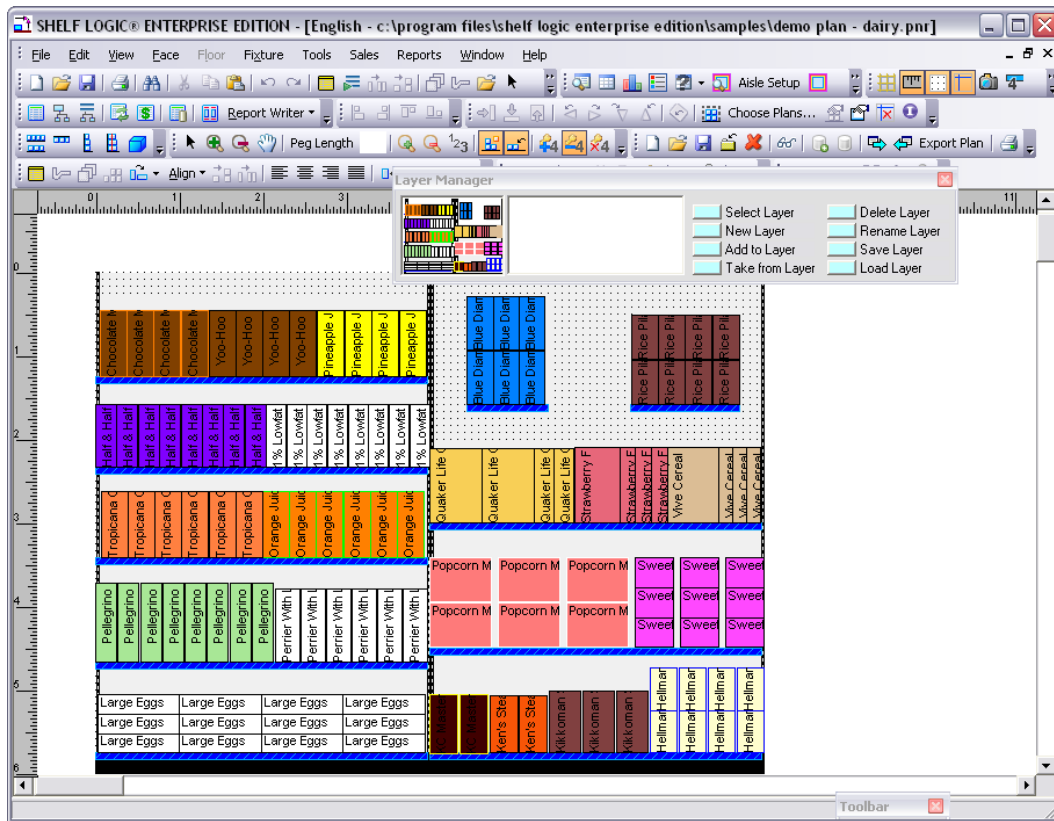
To use the Layer Manager, select it from the Tools menu.



You will see the Layer Manager Window, shown below.



The Layer Manager Window sits on top of the plan window, as shown in the figure below.

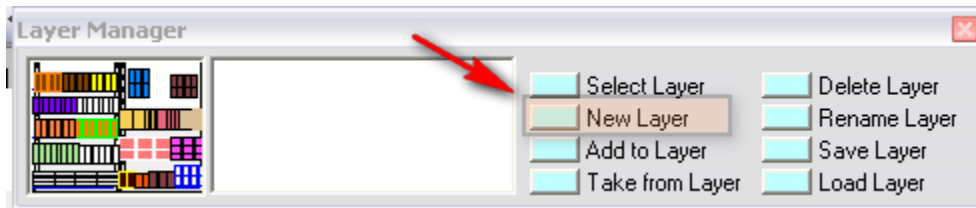


The photos are turned off in the plan above. The image in the small window on the left of the Layer Manager Window represents a tiny image of the plan (without photos), and when a layer is selected, the faces are highlighted.

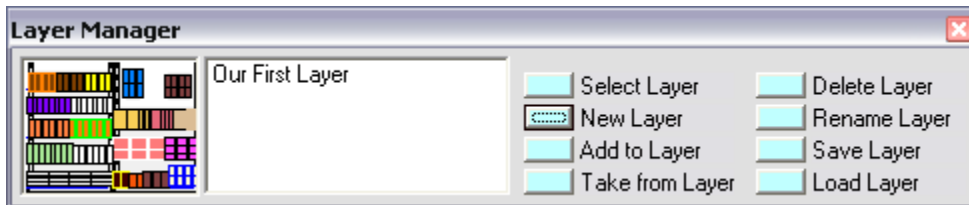
## Creating a Layer

Each layer can store a list of selected faces and there can be many layers in us at one time. Layers can be saved and reused.

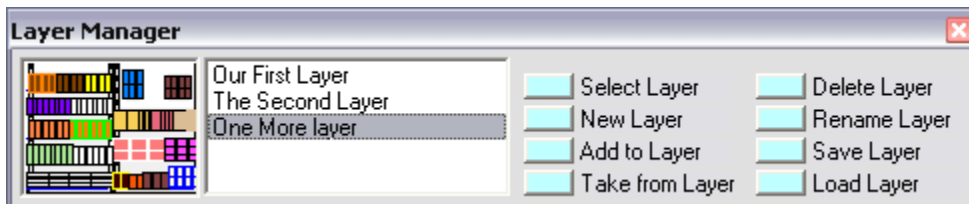
To add a new layer, click on the “New Layer” button.



You will then be asked for a name for the layer. When entered, it will show up in the Layer Manager as shown below.



The first layer has been created. As we create more layers, they are shown the layer window.

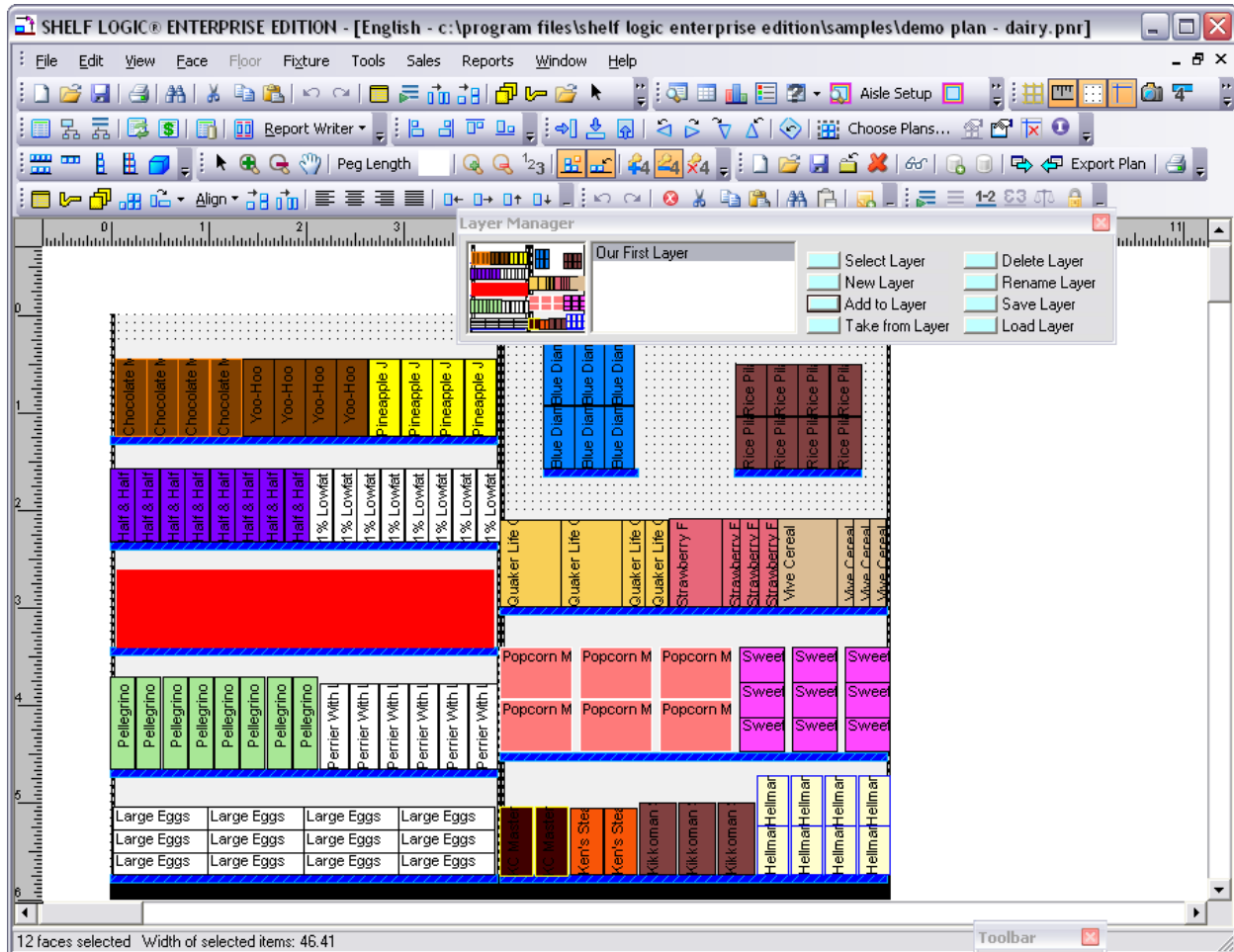


## Adding Selections to a Layer

If you had selected one or more faces prior to starting a new layer, those faces would be added to the layer when it was created.

When or not this was done, you can continue to add more selections to a layer by using the “Add to Layer” button.

First, select the layer, then select one or more faces and then click on the “Add to Layer” button. Those faces are added to the layer.

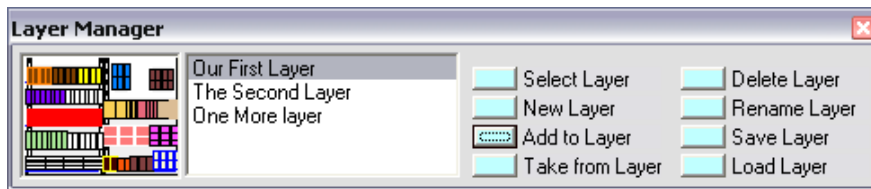


The faces in the layer are shown in the small plan window. You can always add more faces to a layer at a later time.

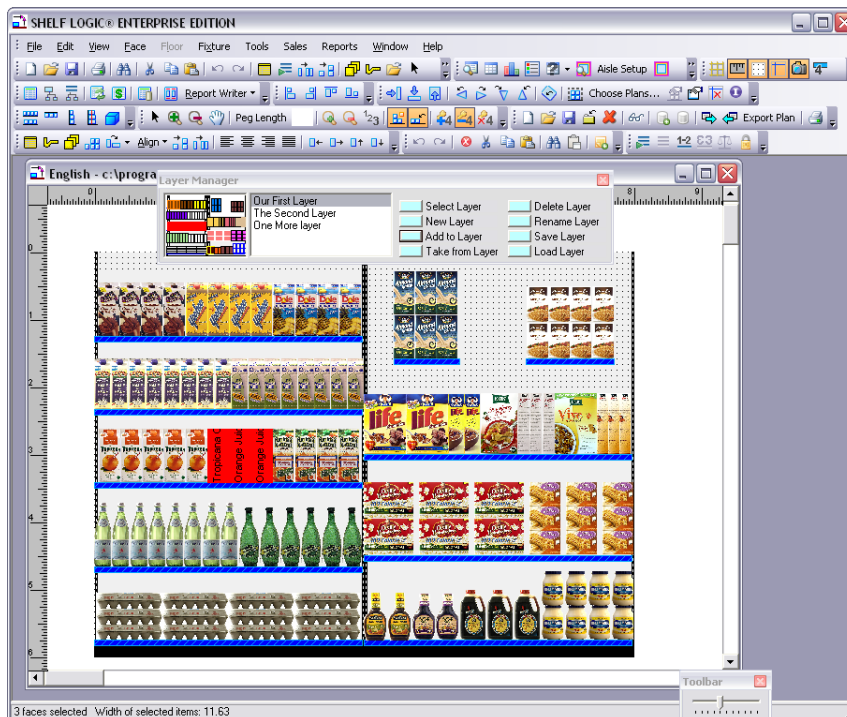


## Removing Selections from a Layer

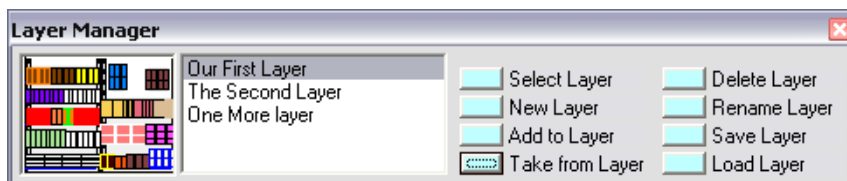
You can remove one or more faces from a layer. First select the desired layer. Below, we have selected the first layer.



We can see the faces in red are selected for that layer. We can only remove a face if it's part of the faces in that layer. In the example below, we will select 3 faces that are part of the layer.



When we click the “Take from Layer” button, these 3 selected face will be removed from the layer.

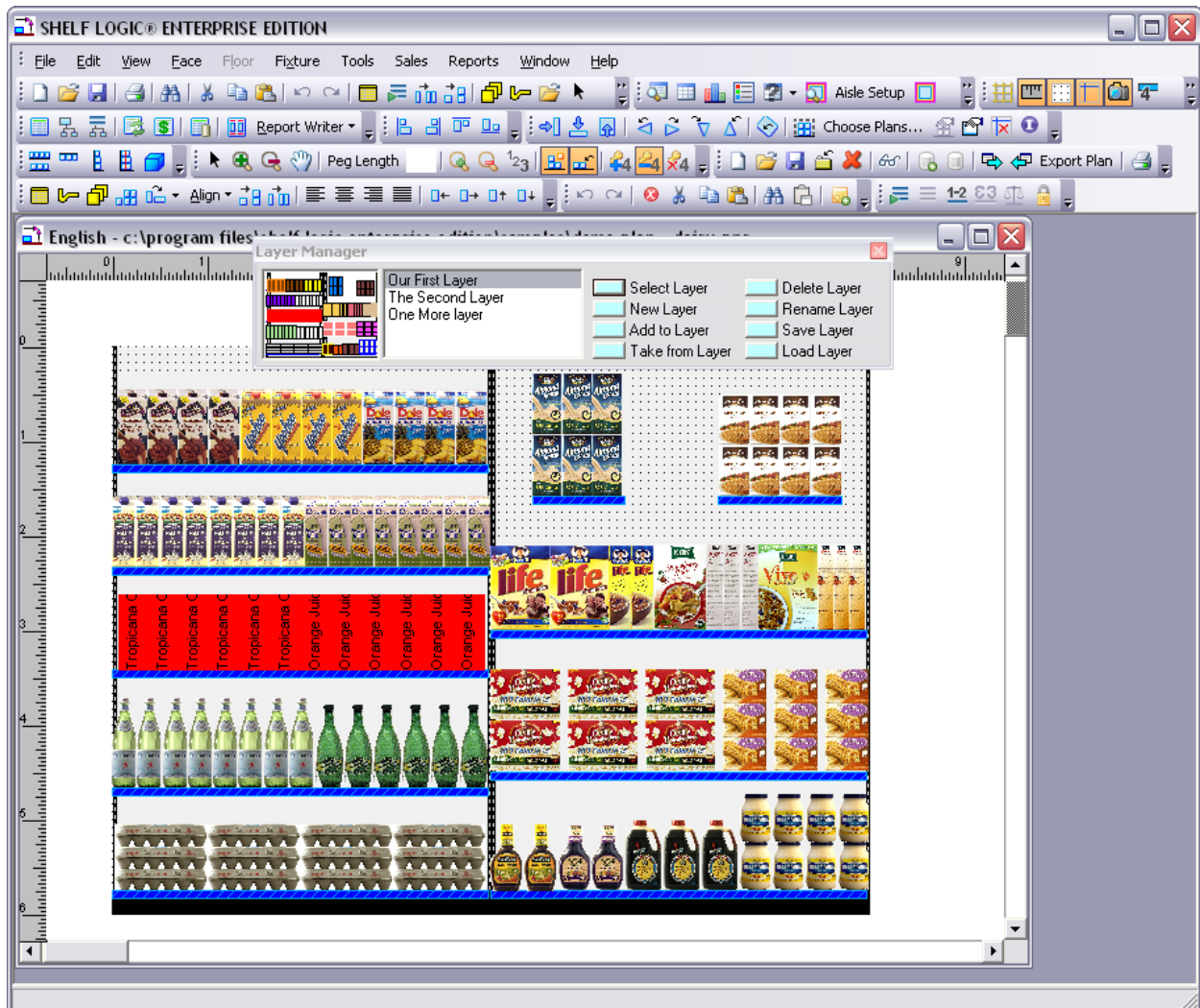


We see that 3 faces are no longer highlighted and no longer a part of the layer.

If you have a large plan, it may not be possible to see the faces in the layer. Select use the “Select Layer” button to select and highlight all faces in the layer. You can then decide which faces are to be removed. You will then need to unselect the faces and select the faces to remove from the layer.

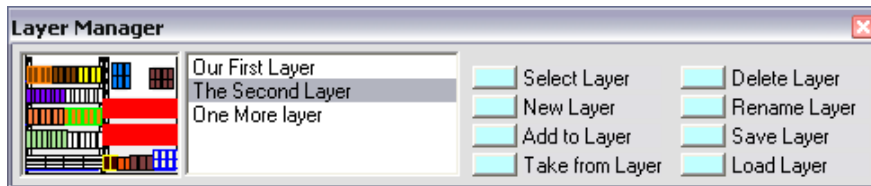
## Selecting Faces in a Layer

Clicking the “Select Layer” button will select the faces in the layer on the plan. Below we have chosen the first layer and clicked the “Select Layer” button. The faces in this first layer are selected and highlighted on the plan.

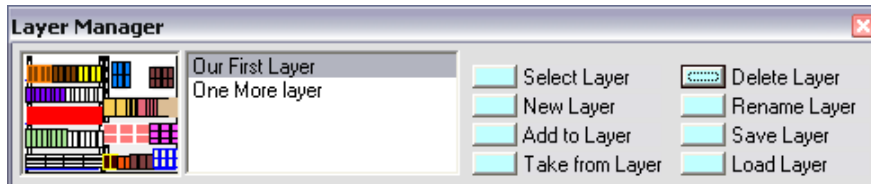


## Deleting Layers

Clicking the “Delete Layer” button will delete the selected layer. In the example below, we will select the 2<sup>nd</sup> layer. Notice that the faces for this layer are displayed in the small plan window on the left.

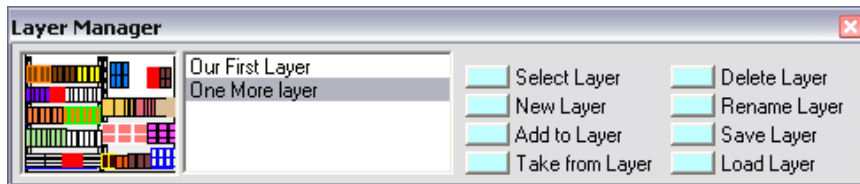


We now click the “Delete Layer” button and the layer is removed, as shown below.

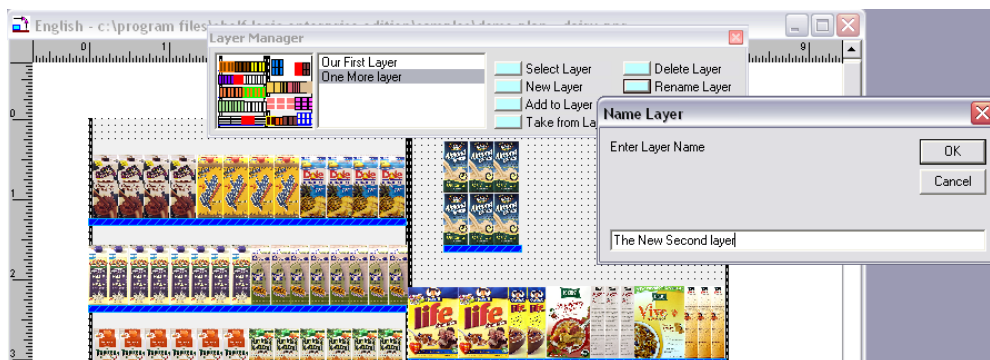


## Renaming Layers

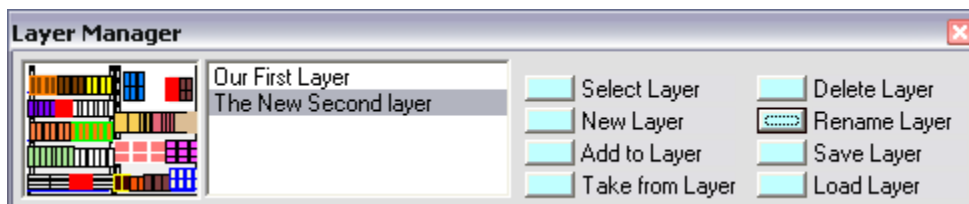
You can rename a layer using the “Rename Layer” button. First select the desired layer.



Click the “Rename Layer” button and enter the new layer name.



The layer is now renamed.



## **Saving Layers**

An individual layer can be saved. This enables you to use the layer with a different plan. Select the layer you wish to save and click the “Save Layer” button. You will be asked for a name for the layer. Each layer saved can have its own name.

A layer consists of a list of UPC Codes. So if you use the layer with a different plan, it will still select those same UPCs that are in the layer.

## **Loading Layers**

A saved layer can be loaded into the layer list of another plan. The same UPC Codes in the layer will work with the other plan as long as that plan contains one or more of those UPC Codes.

But if you save a layer that has 2 occurrences of a certain UPC code and you use it with another plan, the layer will only select 2 faces of that UPC, assuming there are 2 or more faces in the plan.

Shelf Logic lets you format items on shelves and peg areas. There are manual and automatic formatting for justifying products left, right, center, justified and spaced out. There are also alignment features for make product line up top, bottom, left or right..

## Formatting Features

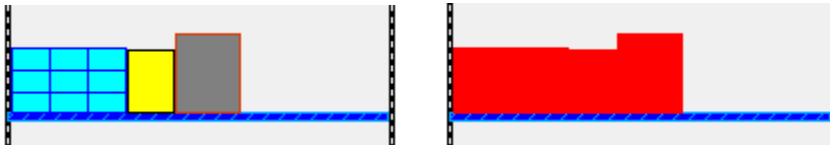
### Manual Formatting

You can take a number of product on a shelf or in a peg area and format them left, right, center or spread out. The product are formatted between a start and end position. You can either use the shelf or segment for the start and end positions (method 1) or specify the start and end positions manually (method 2).

#### Method 1

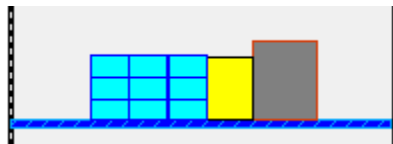
In method 1, the shelf or segment is used for the endpoints. First you select two or more products on a shelf or in a peg area. You can then justify those product left, right, center or spread out. If the product selected are on a shelf, then the justification occurs between the start and end of the shelf. If the products are in a peg area, then the segment start and end are used for the start and end points.

Let's try an example. We'll select all products on a shelf.

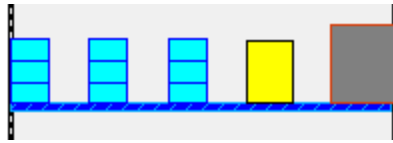


Now we can justify these items in various ways. You can select these by right-clicking on the selected items, or by using selecting “Justify” from the Face menu. You can select left, right, center or spread out. All selected items are affected and the shelf defines the start and end points of the format.

Let's center justify the items selected. We'll right-click and select “Justify”, then “Center”. The items will not look like the figure below.

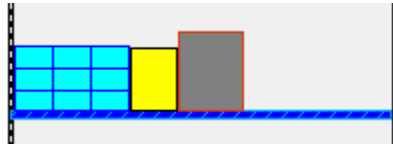


The items are centered between the start and end of the shelf. We can format this again but choose “Spread Out” for the formatting choice. The items will now look like the figure below.



They are now evenly spread out on the shelf.

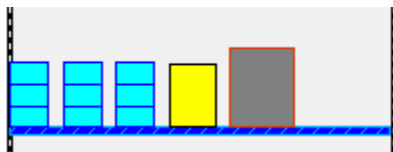
We can select the items and left justify them, and our products looked like they did in the beginning of this example.



When justifying left, right or center, you can specify a gap to go between each justified product, called the *Justify Gap*. In the figure above there is no *Justify Gap*, the items are touching each other.

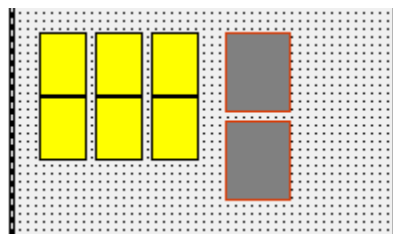
We can specify the *Justify Gap* from the *Justify Menu* or right-click popup menu. This brings up the *Auto Format Window*, which we'll cover shortly. The *Justify Gap* is entered in inches. For this example, we'll enter a gap of 1.5 inches.

With this one and a half inch *Justify Gap*, we'll once again select these shelf items and enter the "Left" selection on the *Justify Menu*. The left justified products will now look like the figure below.

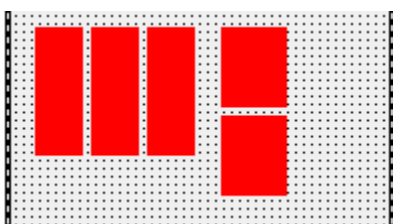


The products are left justified but there's a 1.5 inch space between each of them.

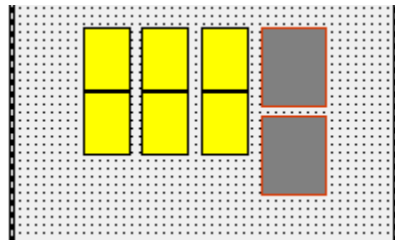
Peg items are justified in the same manner. Let's take an example.



We'll select these peg items and then center justify them.



We'll right-click and then center justify. The items are justified using the segment start and end as the justify endpoints. The items will look like the figure below.



The items are centered within the segment with our 1.5 inch Justify Gap, which remains in effect until a different Justify Gap is entered.

## Method 2

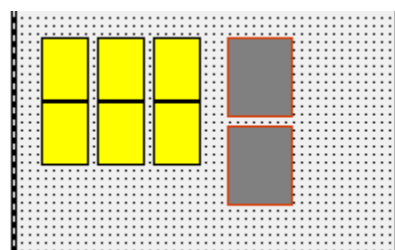
The second method of formatting lets you select the start and end points for the justification. This lets you justify anywhere, not just in a shelf or segment.

In Method 1, you select your items, then issue the desired justify command. In Method 2 this is reversed, you first specify the desired justification, then you use the mouse to indicate the start and end points of the justification.

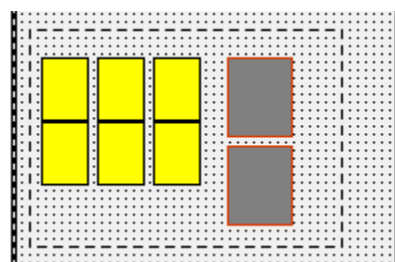
If you want to left justify, first select left justify from the Face menu. Then use the mouse to draw a select box around the products to format and to indicate the left and rightmost justify endpoints.

Here's an example.

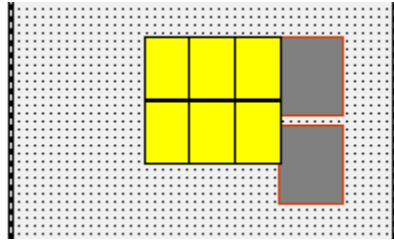
We will right justify these products. First we use the Face menu to select Justify and then Right.



We'll then use the mouse to indicate the products and endpoints.

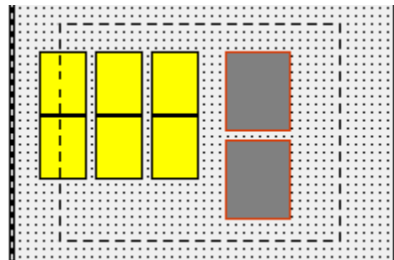


Here the mouse has drawn a box around the faces. The dashes indicating the select box defines the left and right endpoints of the justify.



When the mouse button is released, the products are right justified using the left and right mouse positions. The products are right justified up against the rightmost mouse position. This is useful when formatting products within a shelf or segment. The Justify Gap works with Method 2 the same as with Method 1.

When using this method, make sure that the mouse select box does not end within a product, as shown below.

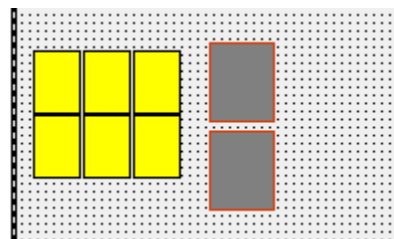


## Product Spread

You can select a group of products and space them out evenly by creating a gap between them. This gap can be increased by pressing the “+” (plus) key or decreased by pressing the “-” (minus) key. This amount is set in the Auto Format Window, under Automatic Formatting.

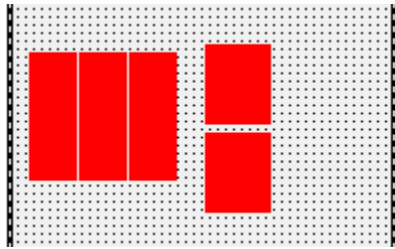
You can just select a group of products and then press “+” to put a space between them. You can press the “+” key several times to increase the space.

Here are our products before spreading

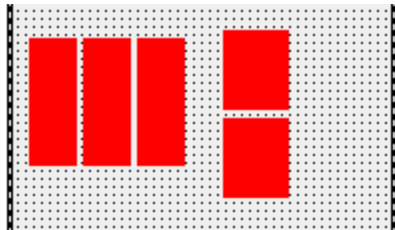




We'll select them.

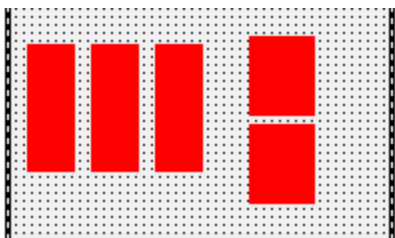


Then we'll press the "+" key twice.



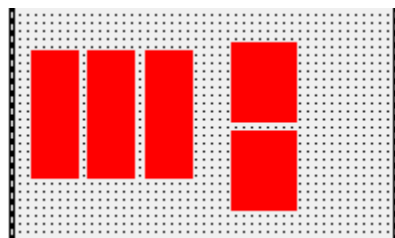
The Increase/Decrease amount is set to  $\frac{1}{4}$  inch so we just put a  $\frac{1}{2}$  inch gap between faces.

Let's click "+" four more times to create a  $1\frac{1}{2}$  inch gap.



We can decrease the gap by pressing the "-" (minus) key. The amount decreased is  $\frac{1}{4}$  inch each time "-" is pressed.

In this next figure, we'll press the "-" key three time for a  $\frac{3}{4}$  inch decrease.

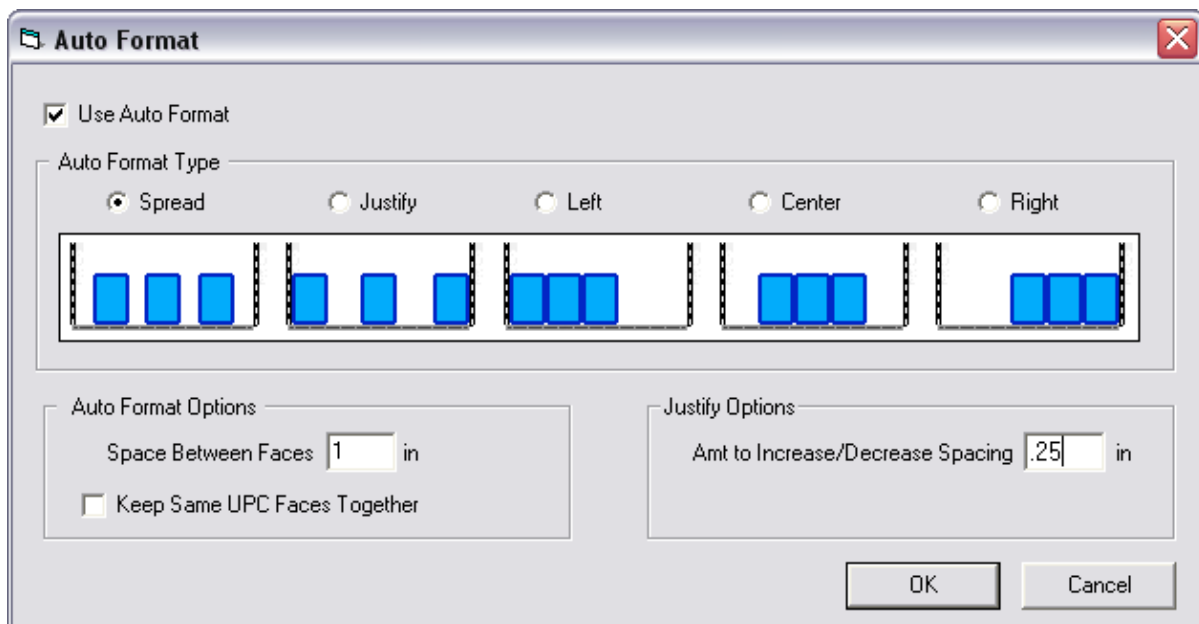


# Automatic Formatting

Shelf Logic has an Automatic Formatting feature that formats and justifies products each time a product is added or removed. This ensures that products are always formatted properly. Each plan and floor plan has its own Auto Formatting setup. One plan can have centered formatting and another plan can have left justified formatting.

First let's take a look at the Automatic Formatting Setup Window, which let's you define the type of formatting desired.

From the View Menu, select "Setup", then "Auto Format". You will see the following window.



## Use Auto Format

Bitmap, 294  
database, 29  
Item Code, 293  
Items, 29

Keyboard, 29  
**Maintenance**, 29  
SKU Code, 293  
UPC Code, 293

If this is checked, then Auto Formatting will be in effect. Each time an item is added or removed, formatting occurs.

## Auto Format Type

**Spread** – This spreads out the item with even space around them, and between the uprights and products.

**Justify** – This is similar to spread except the products are up against the uprights.

**Left** – This will left justify the products.

**Center** – This will center justify the products.

**Right** – This will right justify the products.

### ***Auto Format Options***

**Space Between Faces** – This is the Justify Gap, the space that goes inbetween each product being justified.

**Keep Same UPC Faces Together** – Keeps similar products together when spreading products.

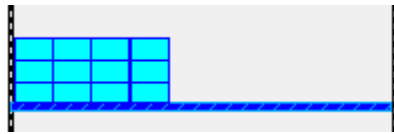
### ***Manual Format Options***

These are used for manual formatting using the Face-Justify commands.

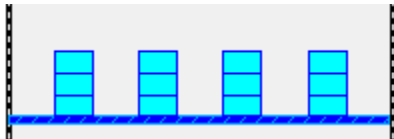
**Amt to Increase/Decrease** – This amount is used when increasing or decreasing the space between product by pressing the Plus and Minus sign keys.

## Using Auto Formatting

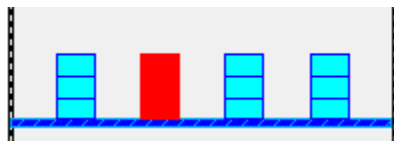
Let's see how Auto Formatting works. The products below will be auto formatted if moved. Auto Formatting is set to "Spread".



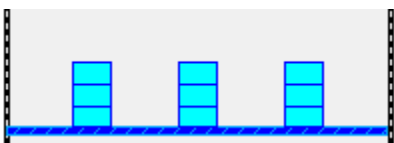
We'll select them and after moving, the products will look like the figure below.



If we delete some of the items, the rest with auto format to be spread out once more. Let's select some products, shown in red below.



When we press the DELETE key to delete these products from the plan, the other products will be formatted, as shown in the figure below.

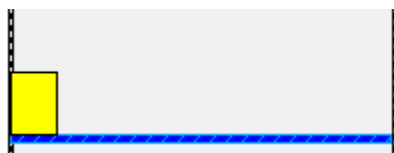


Lets take another example. We set auto justify to Left Justified and set the space between faces as 1 inch. As we fill up an empty shelf, the items automatically justify themselves and create a 1 inch gap between them..

Here's our empty shelf.



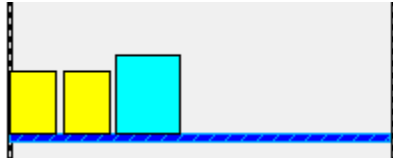
When the first product is placed anywhere on the shelf and the mouse button is released, the product is left justified, as shown below.



When the next product is placed on the shelf, it too, is left justified, with a 1 inch gap between it and the previous product. This is shown in the figure below.



Even if a different product is placed on the shelf, it is justified the same way, as shown below.



# Alignment Features

## The Alignment Commands

Menu:           Item – Align - Top  
Menu:           Item – Align - Bottom  
Menu:           Item – Align - Left  
Menu:           Item – Align – Right

This aligns two or more selected items top, bottom, left or right.

First select one or more items and then select the command. If Top is selected, then the tops of all selected items are on the same level. If Bottom is selected, then the bottoms of the selected items are lined up evenly. If left is selected, then the left edge of the items selected are lined up so they're even on the left. If Right is selected, the items are moved back and forth until the right sides are lined up.

Items aligned left are aligned to the leftmost item. Items aligned right are aligned to the rightmost item. Items aligned top are aligned to the topmost item. Items aligned on the bottom are aligned to the bottommost item.

**NOTE:** Peg items are aligned regardless of their peg hole positions. So even if an item has a peg hole from top of 1 inch, it may be placed a quarter inch from a peg hole in order to properly align. After being aligned, they will moved in peg hole increments but their peg hole placement will not be totally accurate. For many applications, this is not an issue, but this should be kept in mind and items aligned should ideally have the same peg hole positions. The peg hole placement of the item is only for those items on the screen that have been aligned. The item database is not affected.

# Guidelines

## ***Using Guidelines to Position Items***

Shelf Logic® Enterprise Edition lets you create up to 50 vertical and 50 horizontal guidelines to assist in the placement of items on the planogram. Using the Snap To Guideline feature, you can drag an item close to a guideline and it will automatically align against that guideline.

To create a guideline, place the mouse pointer over the horizontal or vertical ruler. When the pointer becomes a double-headed arrow, the guideline is dragged to the desired position on the planogram.

To move a guideline, place the mouse pointer on or near the guideline and drag to the new position. The mouse cursor will change to a double-headed arrow while you are moving the guideline.

To remove a guideline, drag it back onto the rulers or off the Plan Window.

## ***Displaying Guidelines***

Menu: View /Show Guidelines

Keyboard Shortcut: <Ctrl + G>

The Show Guidelines command turns the display of guidelines on and off. If you are using the Snap To Guidelines feature and the guidelines are hidden from view, the Snap To Guidelines feature is also temporarily turned off. Once the guidelines are again displayed, the Snap To Guidelines feature will be back in effect.

# The Grid

## Grid Setup

Menu:

View- Setup - Grid Setup

Shelf Logic® Enterprise Edition can display grid lines or dots over the entire planogram to help position items. You can choose the style of grid and the vertical and horizontal distance between each grid line, however there is not Snap To feature. After executing the above command, the Grid Setup dialogue box will open as shown below:

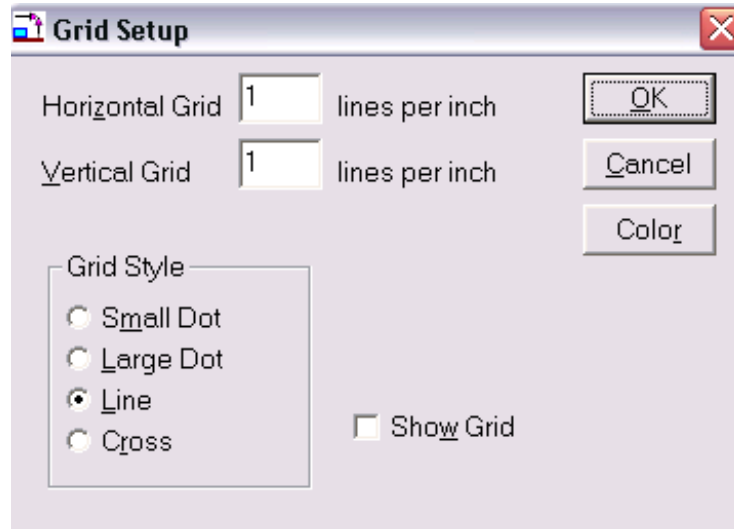


Figure 25. Grid Setup

### Horizontal Grid lines per foot

This is the number of horizontal grid lines per foot of the display. An entry of 1 results in 1 grid line per foot. An entry of 12 results in 1 grid line per inch.

### Vertical Grid lines per foot

This is the number of vertical grid lines per foot of the display. An entry of 1 results in 1 grid line per foot. An entry of 12 results in 1 grid line per inch.

**Grid Style** - Select from one of four grid types:

**Small Dot** – Displays a tiny dot at the intersection of each vertical and horizontal grid position.

**Large Dot** – Displays a larger dot at the intersection of each vertical and horizontal grid position.

**Line** – Displays a line for each vertical and horizontal grid position.

**Cross** – Displays a small cross at the intersection of each vertical and horizontal grid position.

**Show Grid** – Turns the grid display on and off.

**OK Button** – Accepts the grid setup.

**Cancel Button** – Exits without saving the grid setup.



**Default Button** – Makes the current grid setup the default setup for all plans where Show Grid is selected.

**Color Button** – The Color dialogue box will open. You can only select a foreground color since the grid has neither a pattern nor a background color.

## **Turning the Grid On and Off**

Menu: View/Show Grid

This command toggles the display of the grid on and off. You can also turn the grid on or off from the Grid Setup and the Display Setup dialogue boxes.

# The Nudge Command

Keyboard: Up, Down, Left, Right Arrow Keys

You can use the arrow keys to move one or more items or shelves a very slight amount at a time. Select the item(s) or shelves and then press the left arrow key to move left, the right arrow key to move to the right, the up arrow key to move up and the down arrow key to move down.

When you nudge a peg item, it will be moved to the next peg hole position.

When you nudge an item on a shelf, the item is moved one pixel.

When you nudge a shelf, it moves up or down one notch position.

## There are 3 Nudge Amounts Available

1. Pressing an arrow key moves the item one 'increment', as described above.
2. Pressing an arrow key WITH the CONTROL-KEY held down moves the item 5 'increments'.
3. Pressing an arrow key WITH the SHIFT-KEY held down moves the item 10 'increments'.

# Snap To Feature

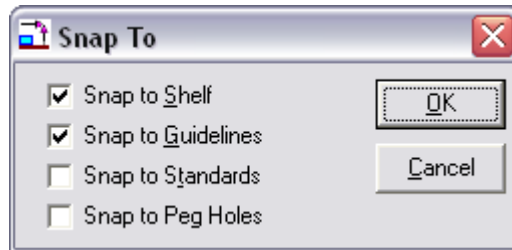
Hot Button:

Snap

Menu:

View/Snap to Setup

Executing one of the above commands will open the Snap To dialogue box as shown below:



**Figure 26. Snap To**

The Snap To features make it possible to align items and shelves more accurately than dragging with the mouse. There are three Snap To options:

## **Snap to Shelf**

When the Snap To Shelf feature is selected, dragging an item near the shelf will cause it to snap to and align with the shelf.

## **Snap to Guidelines**

When the Snap To Guidelines feature is selected, dragging an item near a guideline will cause it to snap to and align with the guideline.

## **Snap to Standards**

When the Snap To Standards feature is selected, an first item placed on the shelf will snap to and align evenly with the left vertical upright.

## **Snap to Peg Holes**

When this feature is selected, product faces will move from one peg hole to another, so that the product is always properly positioned over a peg hole. When the Snap to Peg Holes features is off, a peg facing can be moved anywhere.

## Views

Shelf Logic Enterprise Edition has many viewing options, including among these is the ability to show the display in various views. These are Front View, Top View, Side View, Side View with Cross Section, and fully rotatable 3D view.

Since you can have up to 10 plan/floor windows at the same time, you can have the same plan displayed in multiple windows with different views. So the front and side views can be seen together.

### Front View

Menu: View/Views/Font View  
Keyboard Shortcut: Shift-F1

This shows the front view of the plan. This is the only view that allows you to work with and move products. The other views are ‘view only’ and changes can’t be made to the plan.

### Top View

Menu: View/Views/Top View  
Keyboard Shortcut: Shift-F3

The top view shows the plan looking downwards and has three viewing options. You can view only shelf items, only peg items, or both in the top view.

Normally, the plan is shown starting at the top of the plan and looking downwards. You can change this by selecting a shelf. When this is done, the top view will start with the selected shelf and the shelves and items above it will not be shown. In this manner, you can decide which shelf or shelves should be seen. If a product has a photo top image, it will be displayed.

### *Top View Options*

Menu: View/Views/Top View Options

This menu options lets you select what will be displayed when the Top View is selected to display a plan. The Top View Options lets you show shelf item, peg items or both. Just select which to display from the Top View Options menu. The peg and shelf items options can be turned on or off from here.

## Side View

Menu: View/Views/Side View  
Keyboard Shortcut: Shift-F3

The side view shows the plan looking at it from the left side. If you want to view the side from another point, use the Cross Section View. All items in the plan are displayed from the side. If a product has a photo side image, it will be displayed.

## Cross Section View

Menu: View/Views/Cross Section  
Keyboard Shortcut: Shift-F4

The Cross Section View is the same as the side view except that you can decide where to start viewing from. Instead of starting at the left side of the plan, you can start in segment 2 or 3, or in the middle of the plan, etc.

At the lower right of the Cross Section View Window, you'll see a small image of the plan with a vertical red line. This red line indicates the starting point for the side view. You can click on the small plan display to move the red line to that point. Or you can place the mouse over the red line and drag it back and forth.

Below the small plan display, there's a "+" (plus) and a "-" (minus) button. These will make the plan display larger and smaller so you can more accurately place the red line.

## 3D View

Menu: View/Views/3D View  
Keyboard Shortcut: Shift-F5

This will show your plan as a three dimensional drawing, with or without photos depending upon the show photos setting. Once displayed, you can click on the display and use the mouse to rotate the 3D display in any direction.

These keys will operate in the 3D window.

Control-T	Toggle photo image display
F	Toggle display of product facings only
L	Toggle display of product box lines
<- Left Arrow	Turn plan to the left
-> Rt Arrow	Turn plan to the right
+ (plus sign)	Enlarge plan
- (minus sign)	Reduce plan

You can double-click on the 3D window to display options that let you change the window and plan background colors and set the other options.

# Viewing Options

Shelf Logic® Enterprise Edition has several features to customize the way the main screen and plan is displayed. The following features can be turned on or off at any time during a work session from the View Menu:

## Customizing the Screen Display

### Show Product Photos

Menu: View/Show Product Photos

Shortcut Key: CTL+T

This command will turn the display of product photo images on and off. The program will operate faster when the product photos are turned off. If you have many photos or photos on a slow drive like a CD or network drive, the screen refresh may be slower. Turning off the photos will refresh the screen faster. You can print the plan with photos even if the screen display of photos is turned off.

### Show Product Shapes

Menu: View/Show Product Shapes

This will turn the display of shapes on and off.

### Show Item Text

Menu: View/Show Item Text

This turns the display of Item Text on and off. Item Text is the information that appears in each face when viewed on the screen.

### Show Product Peg Labels

Menu: View/Show Product Peg Labels

This turns the display of Peg Labels on and off. This will show labels if the peg hook type has a label.

### Show Product Pegholes

Menu: View/Show Product Pegholes

This turns the display of Product Pegholes on and off. The Product Peghole is how the peghole looks on the product.

## **Show Pegholes**

Menu: View/Show Pegholes

This turns the display of Pegholes on and off. Pegholes also include vertical and horizontal slats and grid walls. The screen will refresh faster when the pegholes are turned off. When turned off, pegholes will not be visible on screen, but will still control the placement of items on the pegboard sections of the planogram. Turning off peghole display also turns them off on the planogram printout.

## **Show Peg Labels**

Menu: View/Show Peg Labels

## **Show Notes**

Menu: View/Show Notes

This turns the display of Notes on and off.

## **Show Shelf Numbers**

Menu: View/Show Shelf Numbers

This turns the display of Shelf Numbers on and off.

## **Show Ruler**

Menu: View/Show Ruler

This turns the display of the Ruler on and off. When the rulers are turned off, you will not be able to create guidelines.

## **Show Grid**

Menu: View/Show Grid

This command toggles the display of the grid on and off. You can also turn the grid on or off from the Grid Setup and the Display Setup dialogue boxes.

## **Show Guidelines**

Menu: View /Show Guidelines

Keyboard Shortcut: <Ctrl + G>

The Show Guidelines command turns the display of guidelines on and off. If you are using the Snap To Guidelines feature and the guidelines are hidden from view, the Snap To Guidelines feature is also temporarily turned off. Once the guidelines are again displayed, the Snap To Guidelines feature will be back in effect.

## **Show Tool Bar**

Menu: View/Show Tool Bar

This turns the display of the Tool Bar on and off.

## **Show Guidelines**

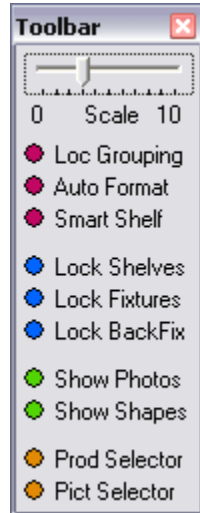
Menu: View/Show Guidelines

It is sometimes helpful to turn off the guidelines for a clearer view of the planogram, however, the Snap-To Guidelines feature will not function when the guideline display is turned off.



# Floating ToolBar

The Floating ToolBar contains commonly used commands and a scale scroll so you can easily change the screen viewing scale of a plan, and is shown in the figure below:



On top is the scale of the plan, from 0 to 10. 0 being the smallest and 10 the largest. Below that are indicators for various commonly used features grouped together. When the feature is turned on, the round indicator light is colored. In the figure above, all indicators are on and colored in.

To turn a feature on and off, click either a colored circle or the words next to it. The features in the Floating Toolbar are:

## ***Loc Grouping***

Location Grouping, this will toggle the grouping of products together so when you click on one product, all products in the group are selected.

## ***Auto Format***

This turns Auto Formatting on and off using the current Auto Format options.

## ***Smart Shelf***

This turns Smart Shelf on and off.

The 3 following options change depending upon the type of plan, planogram or floor plan, that is active.

## ***Lock Shelves (Planogram)***

This locks and unlocks shelves. When locked, shelves can't be moved.

## ***Lock Fixtures (Planogram)***

This locks and unlocks fixtures. When locked, fixtures can't be moved.

***Lock BackFix (Planogram)***

Lock Background Fixtures , this locks and unlocks Background Fixtures. When locked, Background Fixtures can't be moved.

***Lock Fixtures (Floor Plan)***

This lock and unlocks floor fixtures. When locked, floor fixtures can't be moved.

***Lock Obstruction (Floor Plan)***

Lock Obstructions, this lock and unlocks floor obstructions. When locked, floor obstructions can't be moved.

***Lock Dept (Floor Plan)***

Lock Department , This lock and unlocks floor departments. When locked, floor departments can't be moved.

***Show Photos***

This turns the display of photo images on and off.

***Show Shapes***

This turn the display of shapes on and off.

***Prod Selector***

Product Selector, this shows or hides the Product List Selector window.

***Picture Selector***

Picture Selector, this shows or hides the Product Picture Selector window.

The Floating Toolbar can be displayed or hidden using the "Show Floating Toolbar" selection from the View Menu.

## Undo Feature

Hot Button: Undo  
 Menu: Edit/Undo  
 Keyboard Shortcut: <Ctrl + Z>

Each time one of the above commands is executed, your plan reverts back one action. You can click Undo up to 99 consecutive times. Actions that can be undone are:

- Moved shelves and items
- Deleted shelves and items
- Items placed on the planogram
- Updates from database (see Section 4)
- Cut and Paste

## Redo

Hot Button: Redo  
 Menu: Edit/Redo  
 Keyboard Shortcut: <Ctrl+R>

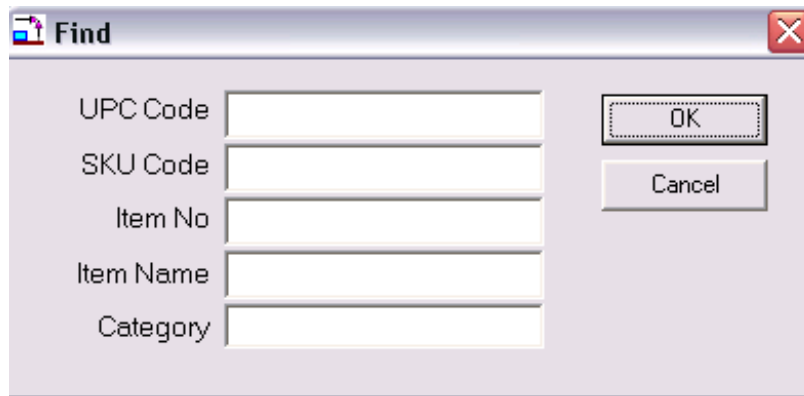
Redo reverses the last Undo operation. You can Redo up to the last 99 Undo operations. If you delete a shelf, the Undo command would restore the deleted shelf. The Redo command would delete the shelf again. With Undo and Redo, you can go backward and forward through changes made to your planogram.

## Finding Items on the Planogram

Hot Button: Find  
 Menu: Edit/Find  
 Keyboard Shortcut: <Ctrl + F>

The Find command works in two ways:

1. If an item is selected and you issue the Find command, all similar items on the plan will be highlighted.
2. If no item is selected, the Find box will open as shown below. Enter a UPC Code, SKU Code, Item Code, Item Name or Category and all matching items on the plan will be highlighted.



**Figure 27. Find Item**

## **Plan Information**

Menu: View/Info

The View Info command displays the plan's vital statistics such as the number of shelves and items, the name of the database used, and the version of Shelf Logic® Enterprise Edition used to create the plan. This information is especially useful when reviewing older plans.

## **Version Information**

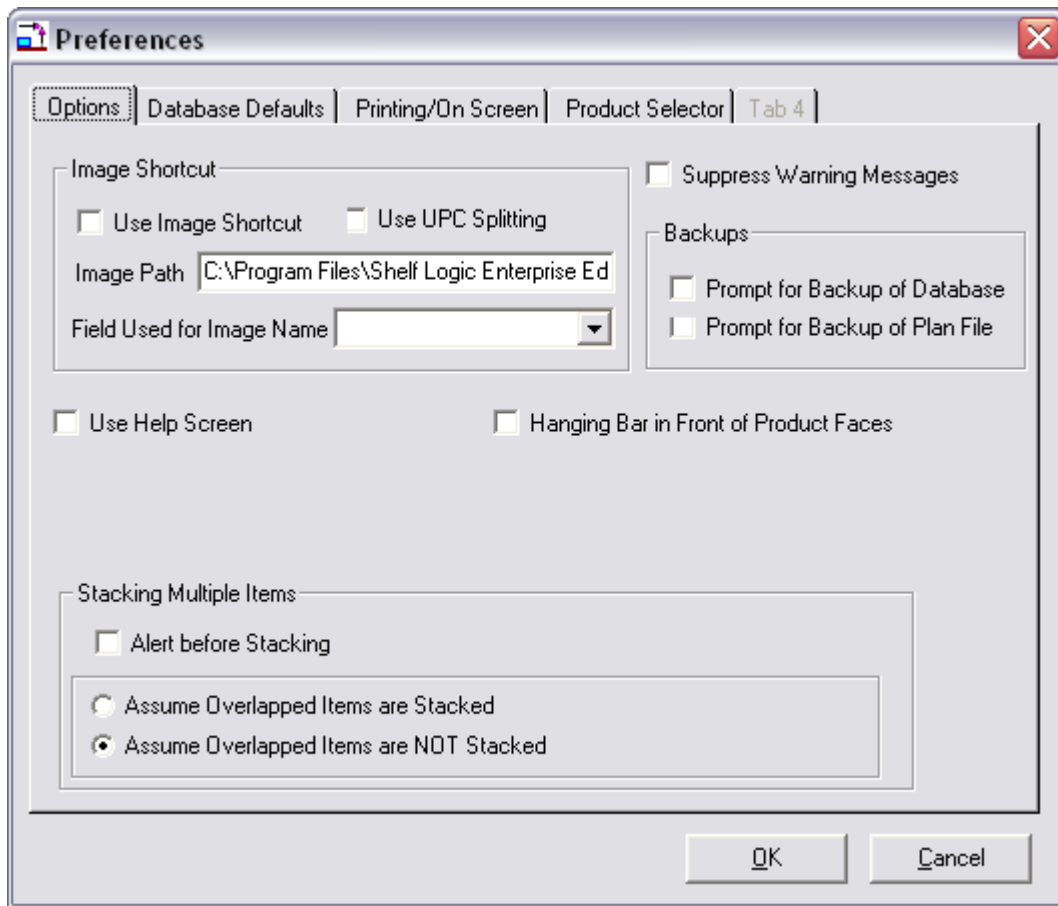
Menu: Help/About

Upon executing the above command, a dialogue box will open and show which Shelf Logic® product and version is currently running.

# Preferences

The Preferences Screen lets you customize Shelf Logic. Use the View/Preferences menu selection to display the Preferences Screen. You will see the following screen:

## The Options Tab



**Figure 28. Preferences Options Screen**

### Suppress Error Messages

If this is checked, then error messages won't be displayed. These included error messages if items are placed in the wrong place, etc.

### Prompt for Backup of Database

If this is checked, then you will be asked if you wish to make a backup of your current database. This will be done each time you switch databases or open a plan that uses a different database from the current database.

### **Prompt for Backup of Plan File**

If this is checked, then you will be asked if you wish to make a backup of your plan. This will be done each time you close a plan, start a new plan, or open an existing plan.

### **Stacking Multiple Items**

When an item is moved over another item, they usually become part of the same facing, sharing the available shelf or peg space.

You can choose whether or not to be alerted when items overlap and asked if you want to make them part of the same facing or not. And if not alerted, you can choose whether overlapping items are considered in the same facing or not.

### **Use Help Screen**

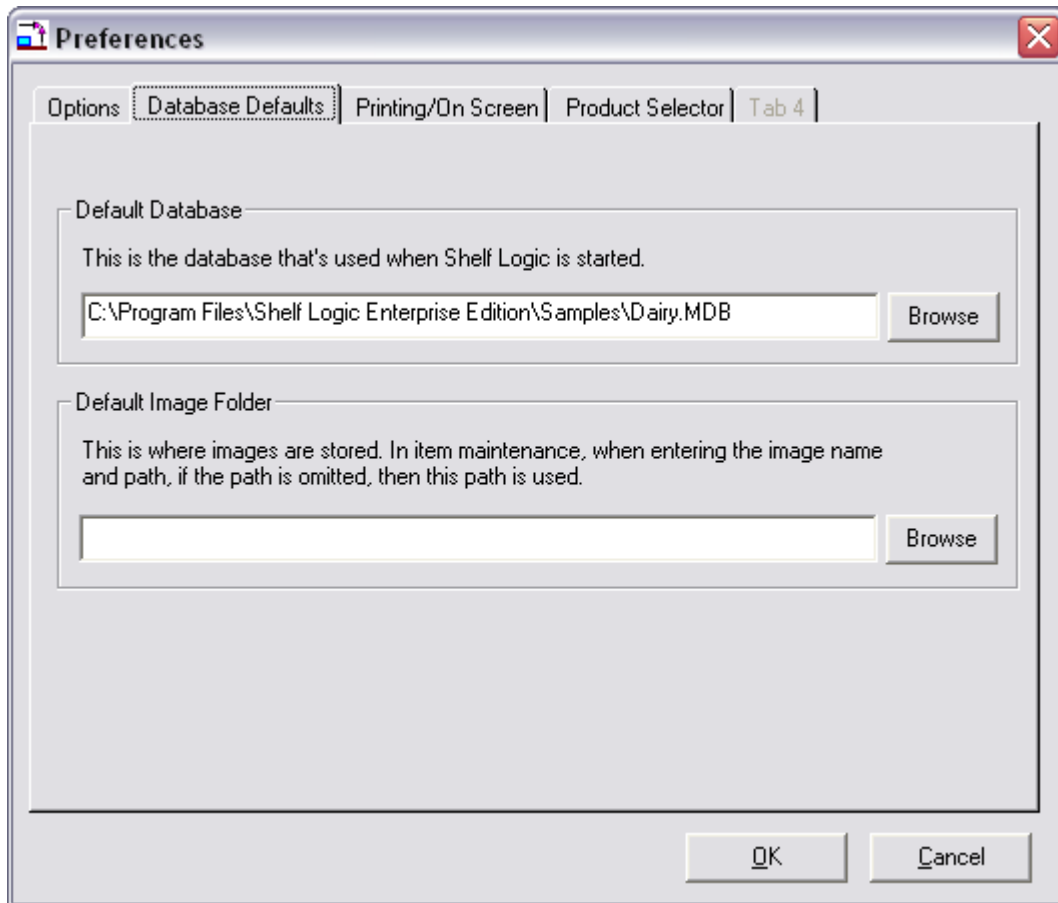
If this is checked, an introductory screen will appear when the program starts. This screen has options for starting a new plan, opening an existing plan, or importing a database..

### **Hanging Bar in Front of Product Faces**

If this is checked, then product faces on a hanging bar will appear behind the hanging bar. If unchecked, then product faces will appear over the hanging bar.

## The Database Defaults Tab

This lets you define the default database, which is the one used when the program first opens. You can also define the path for the image file. This will save on typing, you can just enter the image file name, the path is entered for you.



**Figure 29. Preferences Database Screen**

### Default Database

This lets you specify the database that will be used as a default when a new plan is started. Enter the drive, path and database name. This must be a Shelf Logic database.

### Default Image Folder

This lets you specify the file path where you store your images. When you are specifying an image during Product Information, you don't have to enter this default image path, just enter the image found in this folder.

## The Printing/On Screen Tab

This controls what database information is printed on the product face when the plan is printed, and also when the product is viewed on screen. You can also specify if you want the key number to print and the font to be used for it.

The screenshot shows a 'Preferences' dialog box with a tabbed interface. The 'Printing/On Screen' tab is selected. The dialog is divided into two main sections: 'Product Display Information' and 'Key Number Display Information'. The 'Product Display Information' section has a header 'Enter up to 3 lines of information that will appear on the item when printed'. It contains three rows, each with a text field, a dropdown menu, and a 'Font' button. The first row is 'First Line of Display' with 'Desc' selected. The second row is 'Second Line of Display' with 'UPC Code' selected. The third row is 'Third Line of Display' with '<None>' selected. Below these is another section with the header 'Enter the field name that will appear on the item on screen', containing a 'Field Name' dropdown with 'UPC Code' selected and a 'Font' button. A checkbox labeled 'Transparent Background for Field Name' is checked. The 'Key Number Display Information' section has a header 'Enter if the Key Number should display and what font will be used'. It contains a 'Key Number' dropdown with 'Display Key Number' selected and a 'Font' button. At the bottom of the dialog, there is a checkbox labeled 'Reduce font size to fit in box - to a minimum size of' which is checked, followed by a spinner box set to '0' and the text 'points'. The dialog has 'OK' and 'Cancel' buttons at the bottom right.

**Figure 30. Preferences Printing Screen**

### Product Display Information

This lets you enter the information that will appear inside of the product boxes when the plan is printed. You can specify up to three lines of information. For each line, use the pull down to select the field you want displayed. You can select a font for each line.

After the three lines of information when printed, you can indicated the field that will appear on the item on screen when the Item Text is displayed. You also have a choice of a transparent background or not for the Item Text.



## **Key Number Display Information**

This option lets you turn the printing of the Key Numbers on and off. In addition, you can specify a font for the key number.

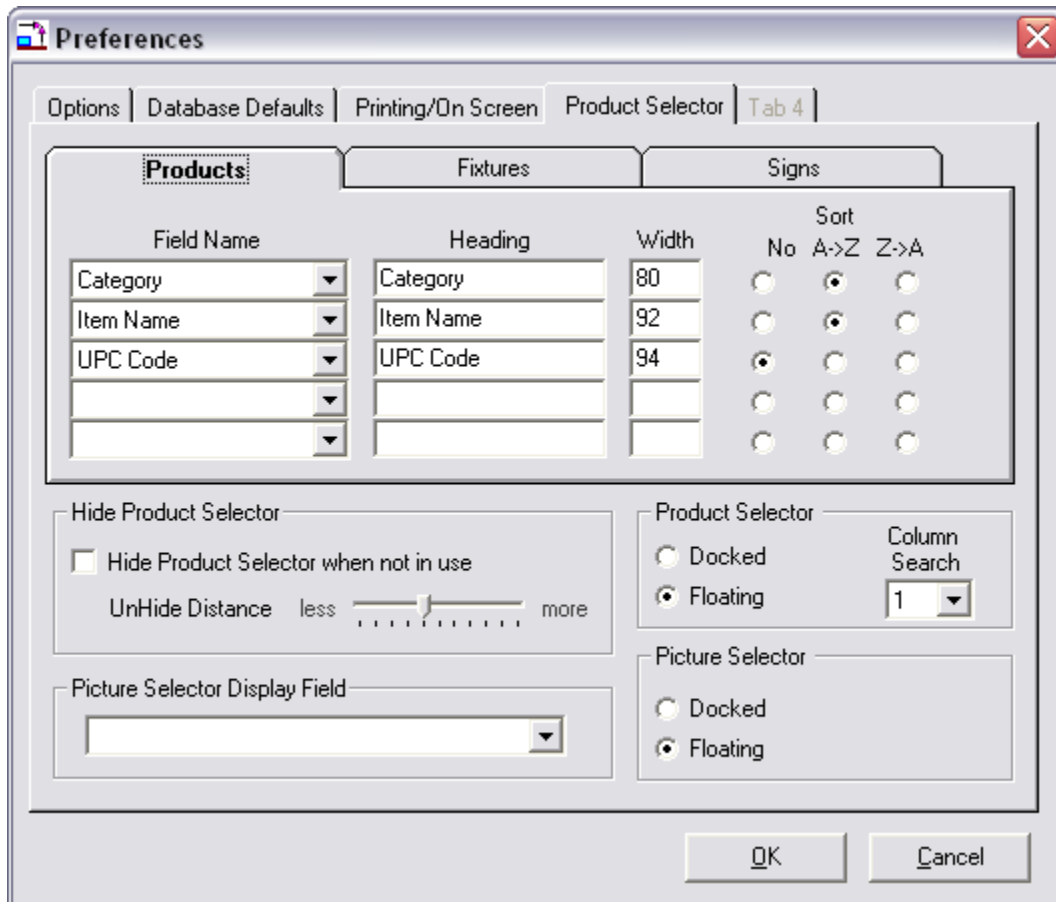
## **Font Reduction**

There are time when the printed box is too small to display the information you have chosen. In that case, you can let Shelf Logic reduce the font until it fits in the item box or until a certain font size has been reached, so the font doesn't get too small.

Checking the "Reduce font size to fit in box" will let Shelf Logic reduce the font size if it doesn't fit. The combo box next to this will let you choose how small you will allow the font before stopping. Enter the smallest font you find acceptable.

# The Product Selector Tab

This lets you specify the fields displayed in the Item Selector Window when working with planograms.



The Item Selector Window displays products. Fixtures and signs. For each of these, you can select up to 5 fields to display. You need to specify the actual field name, the heading in the Item Selector Window, the display width and how the field is sorted, if it is.

## Hide Product Selector

This option will hide the Item Selector Window until the mouse cursor gets close to the right side of the screen. This amount is controlled with the *Unhide Distance*. When set to less, the cursor needs to get close to the right side of the screen. When set to more, the Item Selector Window appears when the mouse cursor gets a bit past the middle of the screen. When the mouse cursor gets close enough, the Item Selector Window appears on the right so you can select a product for it. The distance from the right

## Picture Selector Display Field

This is the field that will appear on the Product Picture Selector Window (when the text option in that window is chosen).

## ***Product Selector***

**Docked** – when this option is selected, the Product List Selector Window is docked to the right side of the screen.

**Floating** – When the floating option is selected, the Product List Selector Window can be moved freely around the screen.

**Column Search** – This indicates the column searched when you type one or more characters. As a character is typed, the Product Selector cursor moves to the first item in the Column Search number column that begins with the character entered. When the second character is entered, the cursor moves to the selection beginning with the first two characters entered. When the third character is entered, the cursor moves to the selection starting with the first three characters entered, and so on.

To start a new search, click on a different selection in the list, and then you can enter your first search character.

## ***Picture Selector***

**Docked** – when this option is selected, the Product Picture Selector Window is docked to the right side of the screen.

**Floating** – When the floating option is selected, the Product Picture Selector Window can be moved freely around the screen.

# Scale, Zoom and Scrolling Features

There are several features that will change the scale of your plan as displayed on the screen. Scaling allows you to view more of the plan by scaling it down to a smaller size, or to enlarge a particular area for closer inspection. There are 10 possible scaling positions that range from 1½: 1 to 63:1.

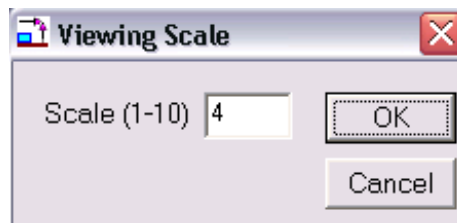
The scaling feature is based upon a monitor resolution of 640x480, which is the recommended resolution when working in Shelf Logic® Enterprise Edition. If you do not know how to change your monitor's resolution in Windows, contact your System Administrator for assistance.

Because Scaling and Zooming are extremely useful tools, there are several alternative features available. Which feature you use will be based upon the particular situation and personal preference.

## Changing the View Scale

Hot Button:	Zoom
Menu:	View/Scale
Tool Bar:	Scale Scrollbar

Upon executing one of the above commands, the Viewing Scale dialogue box will open as shown below:



**Figure 31. Viewing Scale**

Enter a preset scale option by entering a number from 1 to 10. A scale of 1 makes the plan the smallest while 10 enlarges it to maximum size.

The Scale Scrollbar located on the Tool Bar at the left of the screen is an alternative method of setting the scale without using the dialogue box. Dragging the Slider Button will change the scale up or down to one of the 10 settings. For more exact scaling, clicking on the Scroll Arrows located above and below the scrollbar will increase or decrease the scale by an increment of 1 for each click.

## Zoom In/Zoom Out

Menu:	View/Zoom In View/Zoom Out
Keyboard Shortcut:	<F8 Key> Zooms In <F7 Key> Zooms Out

The Zoom features work in much the same way as scaling. Zooming In will increase the scale in increments of 1 each time the command is executed. Zooming Out will decrease the scale in increments of 1 each time the command is executed.

## Magnify Feature

Tool Bar:	+Magnify Button -Magnify Button
-----------	------------------------------------

The Magnify Features allow you to select a specific item, shelf or segment of the plan to zoom into or out of without the need for scrolling.

Clicking on one of the Magnify Buttons located on the Tool Bar will turn the mouse pointer into a Magnifying Glass. You can then click on the segment of the plan you want to focus on. Each click will increase or decrease the scale factor by 1 increment. The Magnify feature will remain in effect until you deselect it by clicking on the pointer arrow at the top of the Tool Bar. This returns the mouse pointer to the standard arrow mode.

## Scrolling Through the Plan

Depending upon the scale setting, you may not be able to view the entire plan in the Plan Window. There are two ways of scrolling to view areas of the plan not visible at the current scale.

### Standard Scroll Bars

The horizontal and vertical Scroll Bars, located at the bottom and right edges of the Plan Window, are used to scroll through the Plan Window.

**Scroll Buttons** – Each click will scroll left, right, up or down by 1 increment.

**Scroll Bar Button** – Indicates your relative position within the Plan Window. The Scroll Bar Button can be dragged with the mouse to scroll through the window.

**Scroll Bar** - Clicking on the vertical Scroll Bar above or below the Scroll Bar Button will scroll by a larger increment (or left/right on the horizontal Scroll Bar).

### Grab Tool

Tool Bar:	Hand Button
Keyboard Shortcut:	<Shift Key>+ Drag Mouse

The Grab Tool is an alternative to using Scroll Bars. When the Grab tool is in effect, the mouse pointer changes to a hand. Position the hand inside the Plan Window and drag the screen up, down, left, or right to the desired view.

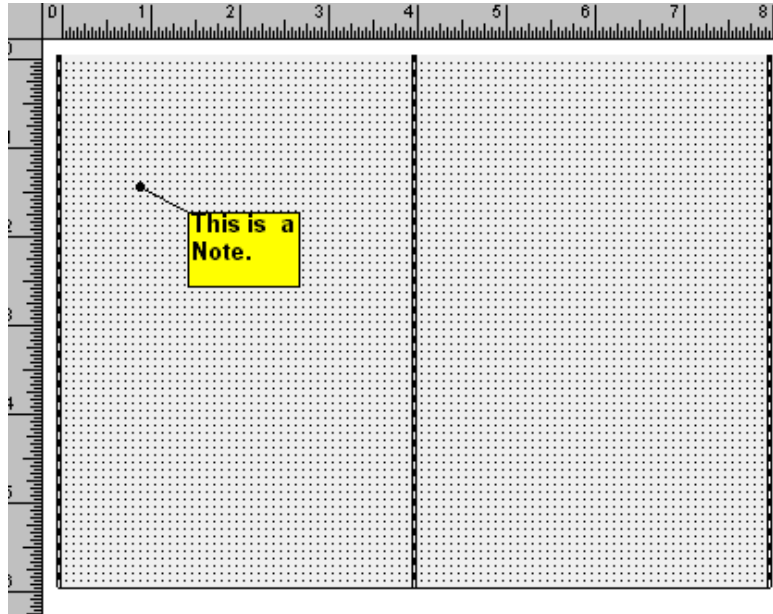
If the Tool Bar is not currently showing, you can activate the Grab Tool by holding down the <Shift Key> while dragging the mouse. Releasing the left mouse button returns the pointer to the standard arrow.

# Notes

Shelf Logic lets you create up to 50 ‘post-it’ style notes onto your plan. You have a choice of font styles, sizes, and colors, and the fill and outline colors for the note. Each note can have it’s own fonts and color scheme.

Every note has a pointer, a round dot, which is used to indicate what the note is referencing. Both note and note pointers can be moved independently of each other, and notes can be resized.

The display of notes can be turned on and off and if turned on, the notes will appear on the planogram printout. Here’s what a note looks like.

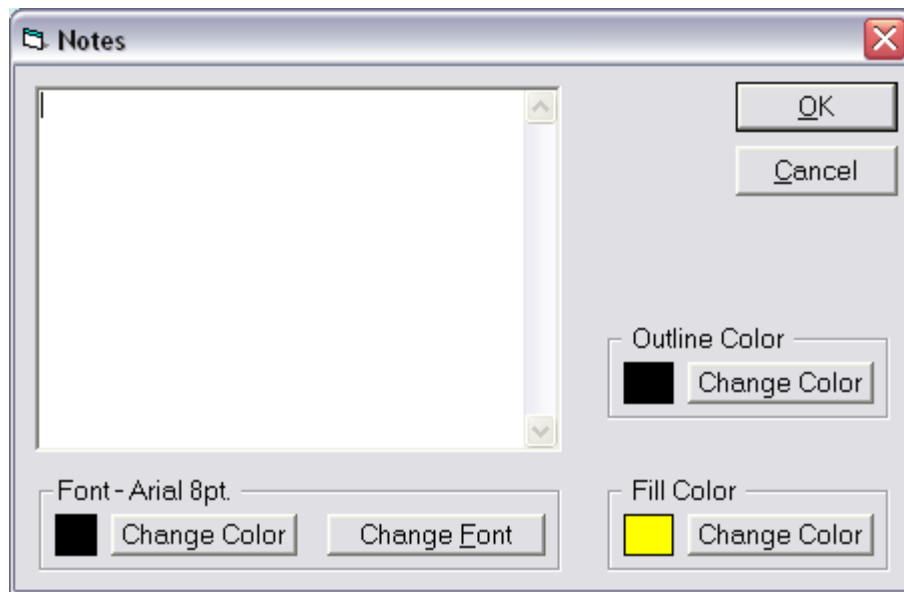


**Figure 32. A Note**

## Creating a Note

Menu: Edit/Enter Note

To create a note, you can either use the “Edit/Enter Note” selection, or right click on the plan where you want the note placed. When you right click on the plan, a popup menu will be displayed. The first selection on the menu is “Enter Note”. When this is selected. The “Notes Dialog Box“ will appear, as shown below:



**Figure 33. The Notes Dialog Box**

Enter your note, and if you wish, select an outline and fill color for the note. You can also enter the font style and color. When you click “OK”, the note will appear on the screen.

## Changing a Note

To change a note, just double-click on the note. The “Notes Dialog Box” will appear with the text of the existing note. You can change the text, font, or note colors. Click OK to make the changes.

## Moving a Note and Note Pointer

A note is moved like a shelf or item. Just click on the note and drag it to the new position. After you click on a note, whether you move it or not, you can move the mouse over the note pointer. When over the note pointer, the mouse cursor changes to a cross. If you click the mouse while over the note pointer, you can move it to a new location.

## Resizing a Note

When you click on a note, ‘note handles’ will appear. They are small black squares that appear at the corners and sides of the note. By clicking on any handle and dragging it, you can change the dimensions of the note.

## Deleting a Note

To delete a note, select it and press the Delete Key. You will be asked to verify the delete before it occurs. Once a note is deleted, it cannot be restored with the “Undo” command.

## Show Notes

Menu: View/Show Notes

You can turn the display of notes on and off using the menu. When the notes are displayed, they will also appear on the plan when printed. If you turn the display of notes off, they won't print either.



## Key Numbering

When the plan is printed, a sequential number appears in the upper right corner of each item. This is called a “Key Number” and is automatically assigned to each item. This number is used in the Product Listing Report to identify the item.

Numbering is done from upper left to lower right. The peg items are numbered first, then the shelf items. There is a printing option you can select to number peg items from upper left to lower right and to number shelf items from left to right on each shelf.

The display of Key Numbers can be turned on and off from the Preferences Screen (menu: View/Preferences). The Preferences Screen also lets you choose the font for the key number.

## Manual Key Numbering

Menu: Tools/Item Key Numbering/Key Numbering Mode On

If desired, you can manually create key numbers for items. You go into a Key Numbering mode using the “Tools/Item Key Numbering/Key Numbering Mode On” menu selection, where each time you click on an item, you assign the next sequential number to that item. If you make a mistake, you can use the “Undo” command to remove the previous Key Number assignment.

You can double-click on an item to assign any Key Number to that item. If you assign a Key Number that is already taken, the other Key Numbers will be changed to fit the assigned Key Number.

Key Numbers are saved with a plan so that are in effect each time you open the plan.

## Turning Off Manual Key Numbering

Menu: Tools/Item Key Numbering/Key Numbering Mode Off

When you are finished assigning Key Numbers, use the above menu selection to turn off the Key Numbering mode.

## Clearing Key Numbers

Menu: Tools/Item Key Numbering/Clear all Key Numbers on Plan

This lets you clear all Key Numbers you have assigned.. You will be asked to verify the clearing of Key Numbers. If you make a mistake, the Undo command will put the numbers back.

## Entering Sales Information

Shelf Logic Enterprise Edition has extensive sales analysis capabilities. All of this begins with the entry of sales figures, upon which the analysis is based. The information gathered consists of three pieces of data for each product: the Net Profit, Cost of Goods Sold and Units Sold. This information is needed for each sales period. With this information, profits and other information can be determined.

### Sales Periods

You can choose whatever sales period you wish for analysis, from daily to quarterly and in between. The first step in specifying sales data is to define the sales periods you use. From the Sales menu, select “Setup Sales Periods” and you will see the Sales Periods Window displayed, as shown below.

Period Amou	Period Nbr	Accounting	Start Date	End Date

For each sales period, you specify the period amount, which can be daily, weekly, biweekly, monthly or quarterly, the period number, which is just a sequential number within the accounting year, the accounting year and the start and end dates for the sales period.

You can enter each sales period manually, or you can have Shelf Logic calculate them for you.

To show current sales periods, enter the accounting year and click the “Get Sales Records” button.

The dialog box titled "Sales Periods" has a close button (X) in the top right corner. Below the title bar, there is a text field for "Accounting Year" containing "2008" and a button labeled "Get Sales Records". To the right of these are four buttons: "OK", "Cancel", "Add Period", and "Remove Year". Below the buttons is another button labeled "Auto Calc". The main area contains a table with the following data:

Period Amount	Period Nbr	Accounting Year	Start Date	End Date
Weekly	1	2008	1/2/2008	1/6/2008
Weekly	2	2008	1/7/2008	1/13/2008
Weekly	3	2008	1/14/2008	1/20/2008
Weekly	4	2008	1/21/2008	1/27/2008
Weekly	5	2008	1/28/2008	2/3/2008
Weekly	6	2008	2/4/2008	2/10/2008
Weekly	7	2008	2/11/2008	2/17/2008
Weekly	8	2008	2/18/2008	2/24/2008
Weekly	9	2008	2/25/2008	3/2/2008
Weekly	10	2008	3/3/2008	3/9/2008
Weekly	11	2008	3/10/2008	3/16/2008

There are scroll bars at the bottom of the table area.

The figure above displays the sales periods for the 2008 accounting year.

### ***Enter Sales Periods Manually***

To enter a sales period, click on the “Add Period” button. You can then enter the information for that sales period. In the figure below, we’ve added a period for the first month of 2008. It’s the first period, and starts January 1<sup>st</sup> and is over at the end of the month.

You don’t have to enter the accounting year on top, that’s for getting the records for a particular year.

The dialog box titled "Sales Periods" has a close button (X) in the top right corner. Below the title bar, there is a text field for "Accounting Year" which is empty, and a button labeled "Get Sales Records". To the right of these are four buttons: "OK", "Cancel", "Add Period", and "Remove Year". Below the buttons is another button labeled "Auto Calc". The main area contains a table with the following data:

Period Amount	Period Nbr	Accounting Year	Start Date	End Date
Monthly	1	2008	1/1/08	1/31/08

The rest of the table area is empty.

### ***Calculate Sales Periods Automatically***

It’s far easier to let Shelf Logic calculate the sales periods for an entire accounting year. This is the preferred method since it’s easier and accurate. To let Shelf Logic calculate the sales periods for you. Click on the “Auto Calc” button. You will see the following window.

**Auto Calc Sales Periods**

This will automatically assign sales periods based on sales reporting periods and starting date.

Accounting Year

Reporting Period

Nbr of Periods in Accounting Year

Accounting Year Start Date

OK Cancel

Active Day of Week

☐ Monday ☐ Friday

☐ Tuesday ☐ Saturday

☐ Wednesday ☒ Sunday

☐ Thursday

This lets you define sales periods for a year beginning with any date. For each accounting year, you will need to enter:

#### **Accounting Year**

This is the year under which these sales periods will be known.

#### **Reporting Period**

This is the period amount, the choices are Daily, Weekly, Biweekly, Monthly and Quarterly.

#### **Nbr of Periods in Accounting Year**

This is the number of periods (as defined on the Reporting Period above) that make up the accounting year.

#### **Accounting Year Start Date**

This is the first day of the accounting year.

#### **Active Day of Week**

This lets you define which days of the week are used in the accounting year. This is used only if you have a daily reporting period.

When you click the OK button, This window will disappear and you will see the sales periods in the Sales Periods Window. Let's try an example.

**Auto Calc Sales Periods**

This will automatically assign sales periods based on sales reporting periods and starting date.

Accounting Year: 2008

Reporting Period: Weekly

Nbr of Periods in Accounting Year: 52

Accounting Year Start Date: 1/1/08

Active Day of Week:

☐ Monday ☐ Friday

☐ Tuesday ☐ Saturday

☐ Wednesday ☐ Sunday

☐ Thursday

OK Cancel

In the figure above, we've laid out 52 weekly periods starting with January 4th, 2008. When OK is clicked, the periods are displayed below.

**Sales Periods**

Accounting Year:  Get Sales Records

Period Amount	Period Nbr	Accounting Year	Start Date	End Date
Weekly	1	2008	1/4/2008	1/6/2008
Weekly	2	2008	1/7/2008	1/13/2008
Weekly	3	2008	1/14/2008	1/20/2008
Weekly	4	2008	1/21/2008	1/27/2008
Weekly	5	2008	1/28/2008	2/3/2008
Weekly	6	2008	2/4/2008	2/10/2008
Weekly	7	2008	2/11/2008	2/17/2008
Weekly	8	2008	2/18/2008	2/24/2008
Weekly	9	2008	2/25/2008	3/2/2008
Weekly	10	2008	3/3/2008	3/9/2008
Weekly	11	2008	3/10/2008	3/16/2008
Weekly	12	2008	3/17/2008	3/23/2008

OK Cancel Add Period Remove Year Auto Calc

You'll notice that the first week ends with Jan 6<sup>th</sup>, so the second and subsequent weeks can start on a Monday.

## Manually Entered Sales Data

Once the sales periods are established, you can now enter sales data for each appropriate sales period. This is done in the Product Information Window, in the Sales tab, as seen in the figure below.

Alternate

First, enter the accounting year and click the “View Periods” button to view the sales periods set up for that accounting year, as shown in the figure below.

**Product Information - C:\Program Files\Shelf Logic Enterprise Edition\Samples\Dairy.MDB**

UPC Code: 3000006080    Item Name: Quaker Life Cinnamon

General    Dimensions    Images    **Sales**    Pricing

**Sales Period**  
Accounting Year: 2008    **View Periods**

- 1 1/1/2008 - 1/7/2008
- 2 1/8/2008 - 1/14/2008
- 3 1/15/2008 - 1/21/2008
- 4 1/22/2008 - 1/28/2008
- 5 1/29/2008 - 2/4/2008
- 6 2/5/2008 - 2/11/2008
- 7 2/12/2008 - 2/18/2008
- 8 2/19/2008 - 2/25/2008
- 9 2/26/2008 - 3/3/2008
- 10 3/4/2008 - 3/10/2008
- 11 3/11/2008 - 3/17/2008
- 12 3/18/2008 - 3/24/2008
- 13 3/25/2008 - 3/31/2008
- 14 4/1/2008 - 4/7/2008

Click Each Sales Period to See Sales Data

	Net Sales	Cost of Goods Sold	Units Sold
Unit			
Tray			
Case			
Display			
Alternate			

Reset All Amounts in this Period to 0

Store:   
Planogram:   
Use This Planogram    Browse for Plan

1 of 1  
Back    Fwd  
Save  
Cancel  
Delete  
Exit  
Item Color  
User Fields

We’ve displayed the sales periods set up for the 2008 accounting year.

Then click on a sales period to select it and the sales data for that sales period will be displayed, as shown in the figure below.

**Product Information - C:\Program Files\Shelf Logic Enterprise Edition\Samples\Dairy.MDB**

UPC Code: 3000006080    Item Name: Quaker Life Cinnamon

General    Dimensions    Images    **Sales**    Pricing

**Sales Period**  
Accounting Year: 2008    **View Periods**

- 1 1/1/2008 - 1/7/2008
- 2 1/8/2008 - 1/14/2008
- 3 1/15/2008 - 1/21/2008
- 4 1/22/2008 - 1/28/2008
- 5 1/29/2008 - 2/4/2008
- 6 2/5/2008 - 2/11/2008
- 7 2/12/2008 - 2/18/2008
- 8 2/19/2008 - 2/25/2008
- 9 2/26/2008 - 3/3/2008
- 10 3/4/2008 - 3/10/2008
- 11 3/11/2008 - 3/17/2008
- 12 3/18/2008 - 3/24/2008
- 13 3/25/2008 - 3/31/2008
- 14 4/1/2008 - 4/7/2008

Click Each Sales Period to See Sales Data

	Net Sales	Cost of Goods Sold	Units Sold
Unit	\$349.00	\$150.00	89
Tray	\$0.00	\$0.00	0
Case	\$0.00	\$0.00	0
Display	\$0.00	\$0.00	0
Alternate			0

Reset All Amounts in this Period to 0

Store:   
Planogram:   
Use This Planogram    Browse for Plan

1 of 1  
Back    Fwd  
Save  
Cancel  
Delete  
Exit  
Item Color  
User Fields

We've selected the first sales period and the sales information displays a zero amount right now. You can now enter the appropriate sales information for each of the 4 possible merchandising types.

As it stands now, sales information entered is for all sales for a particular product. If you want to enter sales for a specific store, enter the store name or number and the information will be for that store only.

You can also enter sales based on this planogram or another planogram. Just enter the planogram name or click "Use this Planogram" to enter sales for the current plan.

Net Sales is the total net amount after expenses. Cost of Goods [Sold] includes all costs, direct and indirect, that went into the product, sales and service. The Units Sold is the number of units sold and not returned.

The sales information entered is automatically saved even if you click the "Cancel" or "Exit" button

# Importing Sales Data

You can import the sales data from an Excel spreadsheet saved as a comma delimited .CSV style file. There's a prototype .CSV file in your program folder called "Sales Import Template.CSV". If you open this in Excel, you will see the field names in the first row and the other rows ready for data. The sales data is arranged by UPC Code and sales periods and can have sales data for any or all of the 4 display types.

This is the column arrangement of the Excel file needed for import.

Column A – UPC Code  
Column B – Period Number  
Column C – Year (4 digits)  
Column D- Unit Net Sales  
Column E - Unit Cost of Goods Sold  
Column F - Unit Units Sold  
Column G - Tray Net Sales  
Column H- Tray Cost of Goods Sold  
Column I - Tray Units Sold  
Column J - Case Net Sales  
Column K - Case Cost of Goods Sold  
Column L - Case Units Sold  
Column M - Display Net Sales  
Column N - Display Cost of Goods Sold  
Column O - Display Units Sold  
Column P - Alternate Net Sales  
Column Q - Alternate Cost of Goods Sold  
Column R - Alternate Units Sold  
Column S – Store Name or Number  
Column T – Planogram Name

The Store Name or Number is used if the sales information is for that Store only. Otherwise the information is for all stores.

The Planogram Name is used if the sales information is for that planogram only. Otherwise the information is for all planograms. You can combine store name and planogram name so that the sales information entered is for that store and for that planogram.

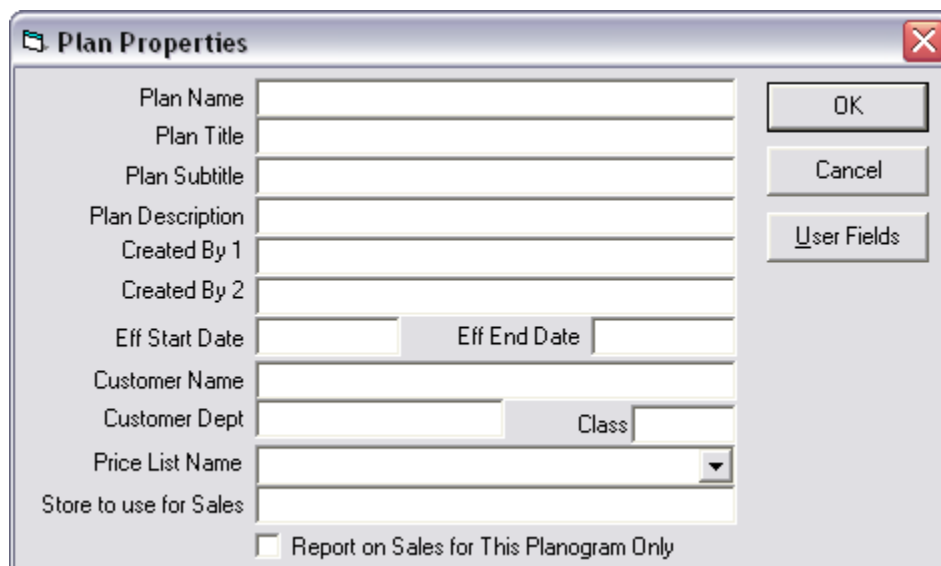
After the information has been entered and the spreadsheet saved as a .CSV file, Use the "Import Sales Data" selection from the Sales menu. Enter the name of the .CSV file and the information will be imported. If the UPC Code, sales period and year exists, the information in the import file will replace it. If the UPC Code, sales period and year doesn't exist, it will be added to the Sales file.



## Using Sales Data

When running sales related reports and other analysis involving sales, you can use general sales figures or for a specific store and/or planogram.

To use sales figures for a specific store, enter that store name or number in Plan Properties (from the View menu).

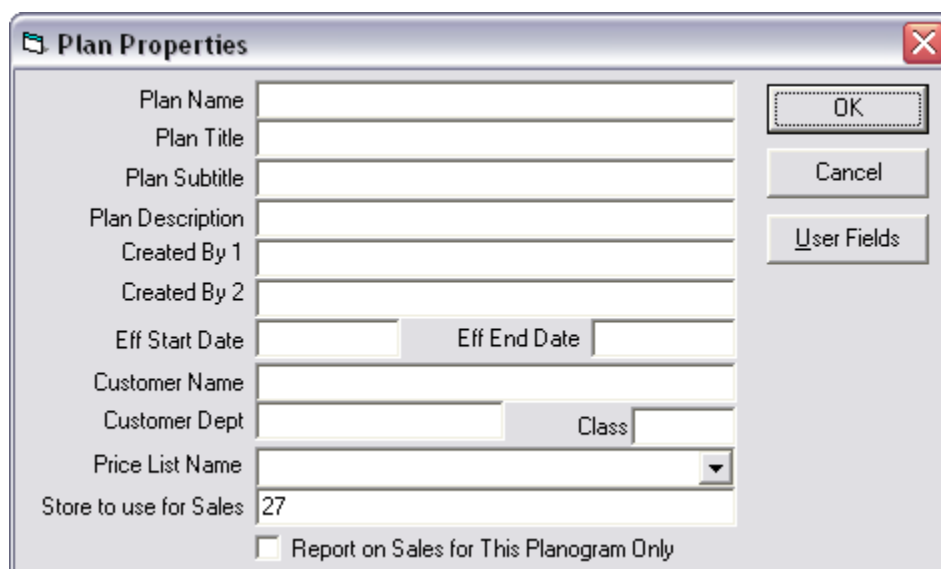


The image shows a 'Plan Properties' dialog box with the following fields and controls:

- Plan Name
- Plan Title
- Plan Subtitle
- Plan Description
- Created By 1
- Created By 2
- Eff Start Date
- Eff End Date
- Customer Name
- Customer Dept
- Class
- Price List Name (dropdown menu)
- Store to use for Sales
- ☐ Report on Sales for This Planogram Only
- OK button
- Cancel button
- User Fields button

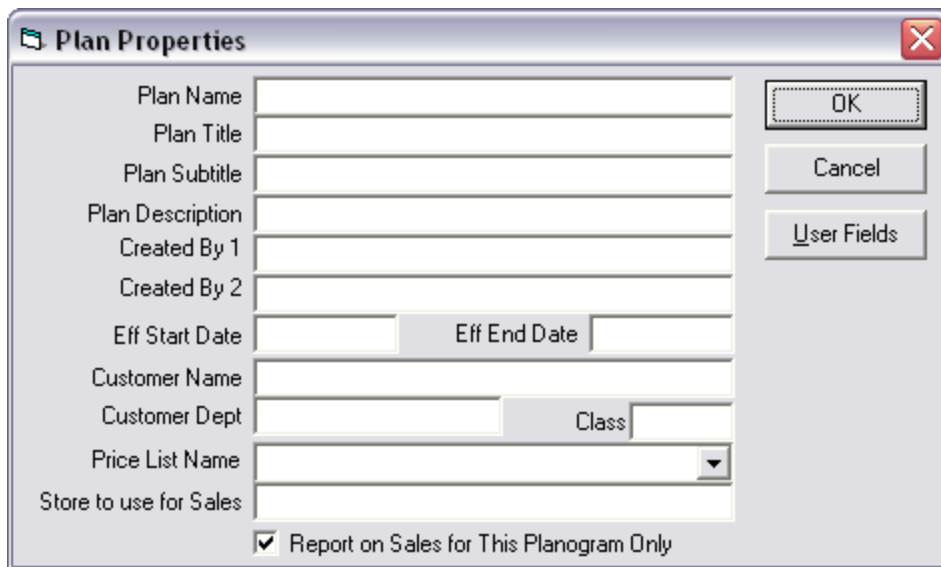
Since there is no store entered above, sales information will be for all stores.

In the figure below, store 27 is entered so only sales data for that store will be used on reports, etc.



The image shows the 'Plan Properties' dialog box with the 'Store to use for Sales' field set to '27'. The 'OK' button is highlighted with a dashed border. The 'Report on Sales for This Planogram Only' checkbox is unchecked.

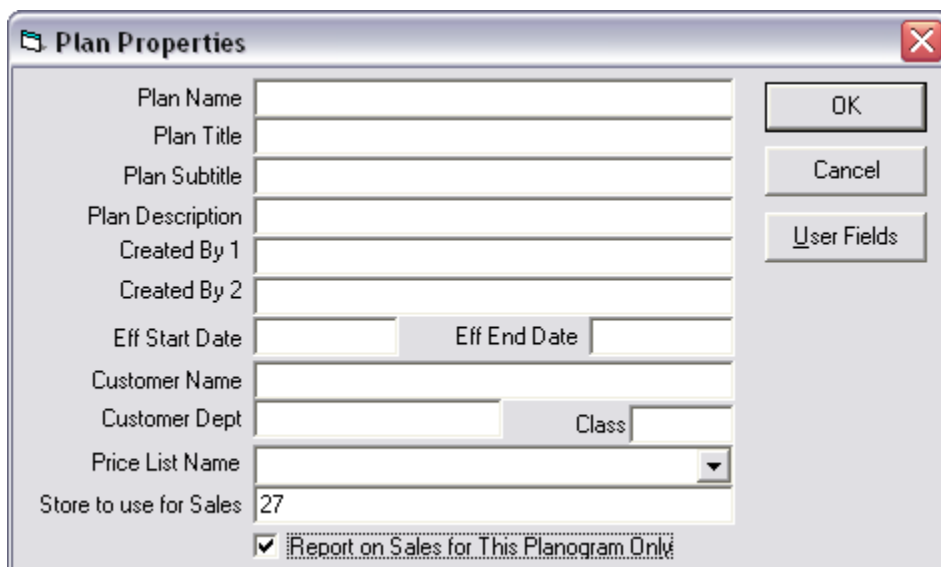
In this next figure, there is no store but we've checked the "Report on Sales for This Planogram Only". This means that only the sales for the current planogram will be used.



The 'Plan Properties' dialog box contains the following fields and controls:

- Plan Name: Text input field
- Plan Title: Text input field
- Plan Subtitle: Text input field
- Plan Description: Text input field
- Created By 1: Text input field
- Created By 2: Text input field
- Eff Start Date: Text input field
- Eff End Date: Text input field
- Customer Name: Text input field
- Customer Dept: Text input field
- Class: Text input field
- Price List Name: Text input field with a dropdown arrow
- Store to use for Sales: Text input field
- Report on Sales for This Planogram Only: Checked checkbox
- Buttons: OK, Cancel, User Fields

And finally, as in the figure below, we can also enter a store number so sales data for this planogram for store 27 will be used.



The 'Plan Properties' dialog box is shown with the 'Store to use for Sales' field populated with the value '27'. All other fields and controls remain the same as in the previous image.

In order to do this, you have to have sales information entered for a particular store and planogram name. Otherwise, zero amounts will show up.

# Visual Sales Reporting

Shelf Logic Enterprise Edition has extensive sales reporting capabilities. One of these is the Visual Sales Reporting features which colors products on the planogram according to the report parameters. There are 4 basic types of Visual Sales Reports. Threshold Analysis, Group Analysis, Quadrant Analysis and General Compare.

To use this Visual Sales Reporting feature, you first configure the reports, then save them so they can be used over and over. Then, these report can be used to color your planogram according to the report output.

We'll create one report and then show you what it looks like when it's run. Then we'll cover the other types of reports.

## Configure Visual Sales Reports

In order to configure a Visual Sales Report, choose the "Visual Sales Reporting" selection from the Sales menu. Then choose "Configure Visual Sales Reports" and you will see the Visual Report Properties Window shown in the figure below.

The screenshot shows a window titled "Visual Report Properties" with a close button in the top right corner. Inside the window, there is a tabbed interface with four tabs: "Threshold Analysis", "Group Analysis", "Quadrant Analysis", and "General Compare". The "Threshold Analysis" tab is currently selected. Below the tabs, there is a table with four columns: "Field Name", "Comparison", "Value", and "Description". The "Field Name" column has a dropdown menu. The "Comparison" column has radio buttons for "<=", ">", and ">=". The "Value" column has a text input field. The "Description" column has a text input field and a color selection button labeled "Color". Below the table, there is a section titled "For Description Field:" with two lines of text: "Use \"\_value\" to show the value in the Key" and "Use \"<remove>\" to remove line from Key". At the bottom of the window, there are four buttons: "Load Report", "Save Report", "Clear Report", and "Sales Range".

Field Name	Comparison	Value	Description
	<=		<input type="radio"/> Constant
	>		<input type="radio"/> Average
	>=		<input type="radio"/> Midpoint

For Description Field:  
Use "\_value" to show the value in the Key  
Use "<remove>" to remove line from Key

Title

There are 4 types of reports available. We'll cover the first report and how to configure and run it, then go on to the other 3 reports.

## Threshold Analysis

The first tab has the specifications for the Threshold Analysis. This lets you set a ‘zero point’ in any field value and color products according to whether or not they fall below or above this ‘zero point’. Let’s create a report.

We’ll select the “Retail Price” field for the comparison. The comparison value can be a constant as it is here (5.00). If the sell price is less than or equal to 5.00, then the product will be colored green. If the sell price of the product is more than 5.00 it will be colored magenta, as shown in the figure below.

The screenshot shows the 'Visual Report Properties' dialog box with the 'Threshold Analysis' tab selected. The dialog has a title bar with a close button. Below the title bar is a section labeled 'Visual Sales Report'. The main area contains several tabs: 'Threshold Analysis', 'Group Analysis', 'Quadrant Analysis', 'General Compare', and 'Settings'. The 'Threshold Analysis' tab is active and contains the following fields and controls:

- Field Name:** A dropdown menu with 'Retail Price' selected.
- Comparison:** Radio buttons for '<=' (selected) and '>'.
- Value:** A text box containing '5.00'.
- Comparison Type:** Radio buttons for 'Constant' (selected), 'Average', and 'Midpoint'.
- Description:** Two empty text boxes for describing the color ranges.
- Color Selection:** Two color swatches. The top one is green and labeled 'Color'. The bottom one is magenta and labeled 'Color'.
- For Description Field:** A section with instructions: 'Use "\_value" to show the value in the Key' and 'Use "<remove>" to remove line from Key'.
- Title:** A text box containing 'Retail Price Above 5 Dollars'.

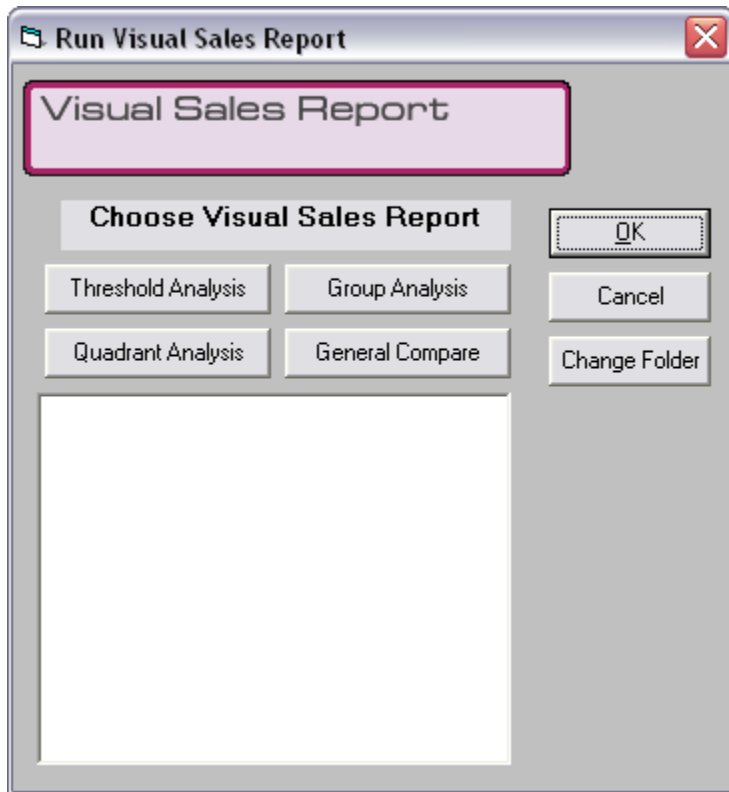
At the bottom of the dialog are several buttons: 'Load Report', 'Save Report', 'Clear Report', 'Sales Range', and 'Done'.

The comparison value can be set to an average (mean) of all of the values, or it can be set to the midpoint (median) of all of the values. This is useful since the midpoint or average changes with each plan, so indicating an average or midpoint makes the report useful for all plans. We’ll also give the report a title which will appear in the Sales Color Key window.

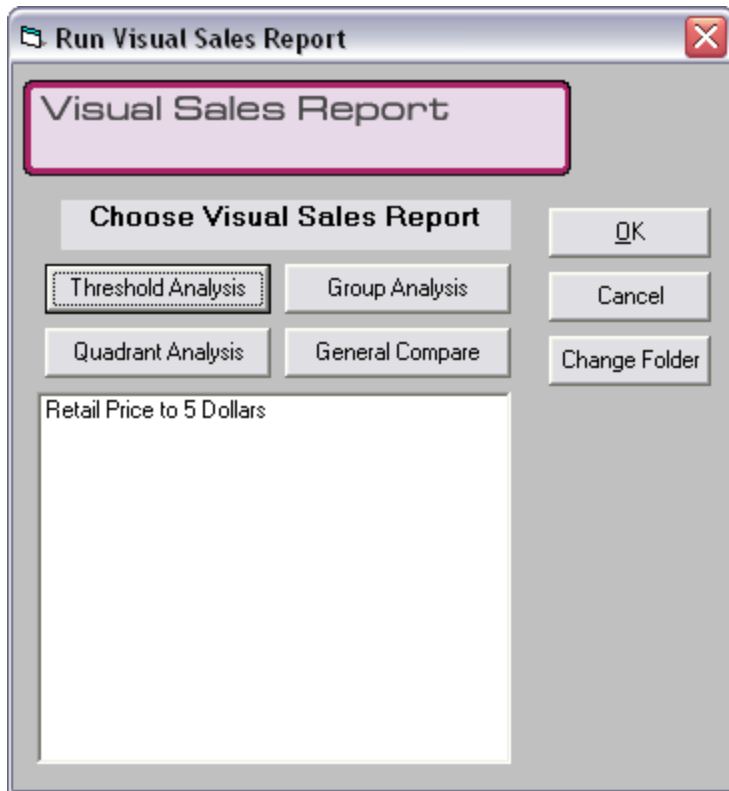
Now we’ll save the report so we can use it. Click on the “Save Report” button and give the report a name.

## Running A Visual Sales Report

Before going on to the other types of Visual Sales Reports, let's look at how they are run. Once a Visual Sales Report is defined and saved, it can be used with any planogram. From the Sales menu. Choose "Visual Sales Reporting" and then "Run Visual Sales Report". You will see the following window where you can enter the name of the report.



Click on the type of report desired and the existing reports of that type will be displayed. We'll click on the *Threshold Analysis* button and the threshold analysis reports will be displayed, as shown below.



Click on the report name and click OK or just double-click on the desired report name.

Once you have selected the report, it will color your products on the plan according to the report specs.

Below is an example of the report defined above.



The products with a retail price less than 5 dollars are outlined in green, the others in red.

Also displayed with the Visual Sales Report is the Sales Color Key, shown in the figure below, which tells you what the colors represent.

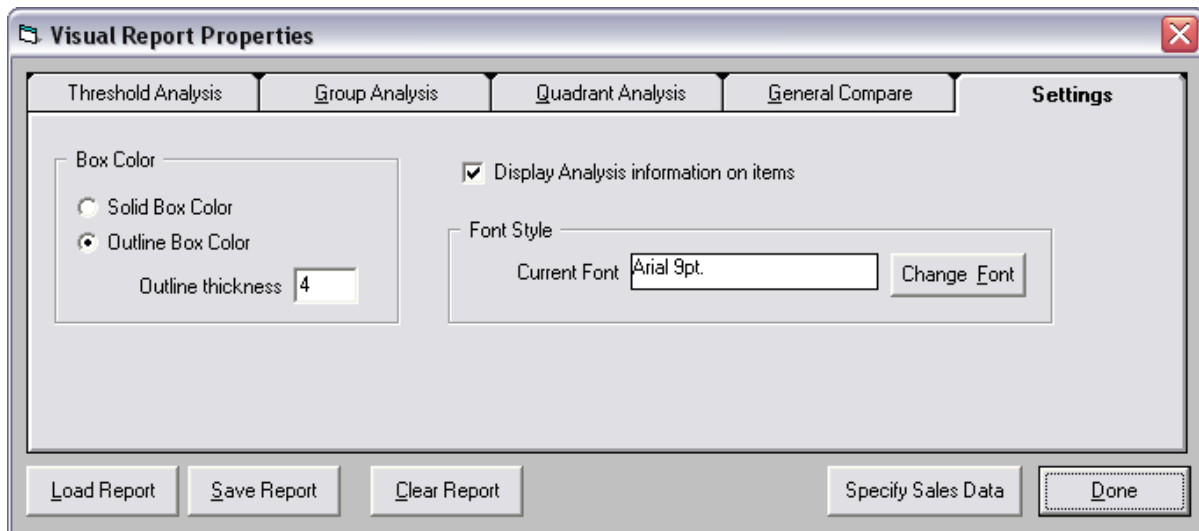


This is a 'floating window', you can move it anywhere or it can be closed by clicking the small red "X" in the upper right corner of the Sales Color Key window.

You can still work with the plan when it looks like this. You can still move items, etc. until the report is turned off. To turn off a Visual Sales Report, click on the *Stop Report* button on the Sales Key, or use the Sales menu. Select "Visual Sales Reporting" then choose "Stop Visual Sales Report".

# Visual Sales Report Options

The 5<sup>th</sup> tab in the Visual Report Properties window is the *Settings* tab, as shown in the figure below. This has several options for the Visual Sales Reports. These options work for all 4 Visual Sales Reports (Threshold Analysis, Group Analysis, Quadrant Analysis, and General Compare).



## Box Color

This option lets you color the entire product or just create an outline of color around the product.

### Solid Box Color

Clicking this will color in the entire product box as shown in the figure below on the right.

### Outline Box Color

This will create a colored outline around the product, as shown in the figure below on the left.



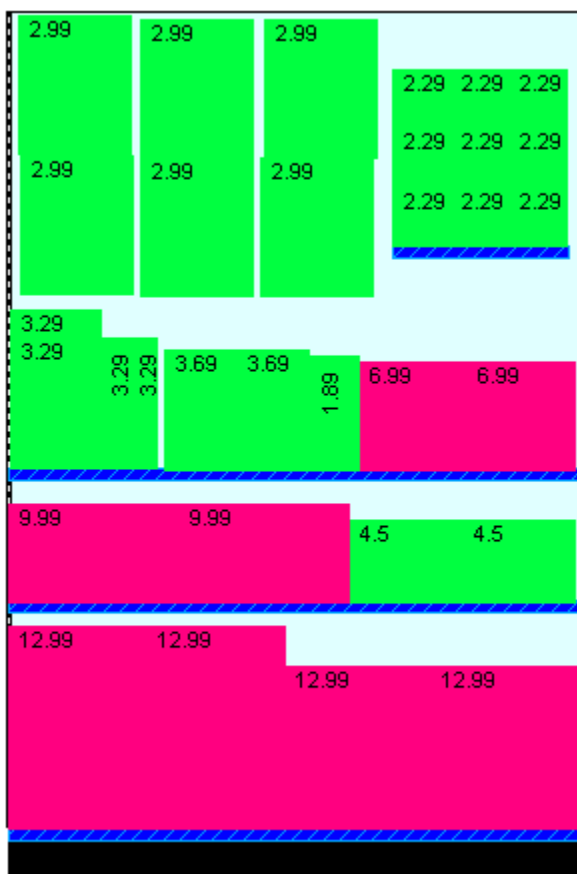
### Outline Thickness

This controls the thickness, in pixels, of the outline around the product.



## Display Analysis Information on Items

Color choices are based on one or more comparison values. You can display these values on the products with this option. In our Threshold Analysis report, we based the comparison on the Retail Price of the product. When the *Display Analysis Information on Items* checkbox is checked, then the product's retail price will be displayed on the product as shown in the figure below.



You can change this font if desired as well. The display information works with a solid box color or an outline color.

When this option is turned off, the normal information will be displayed on the products, as shown on the figure below

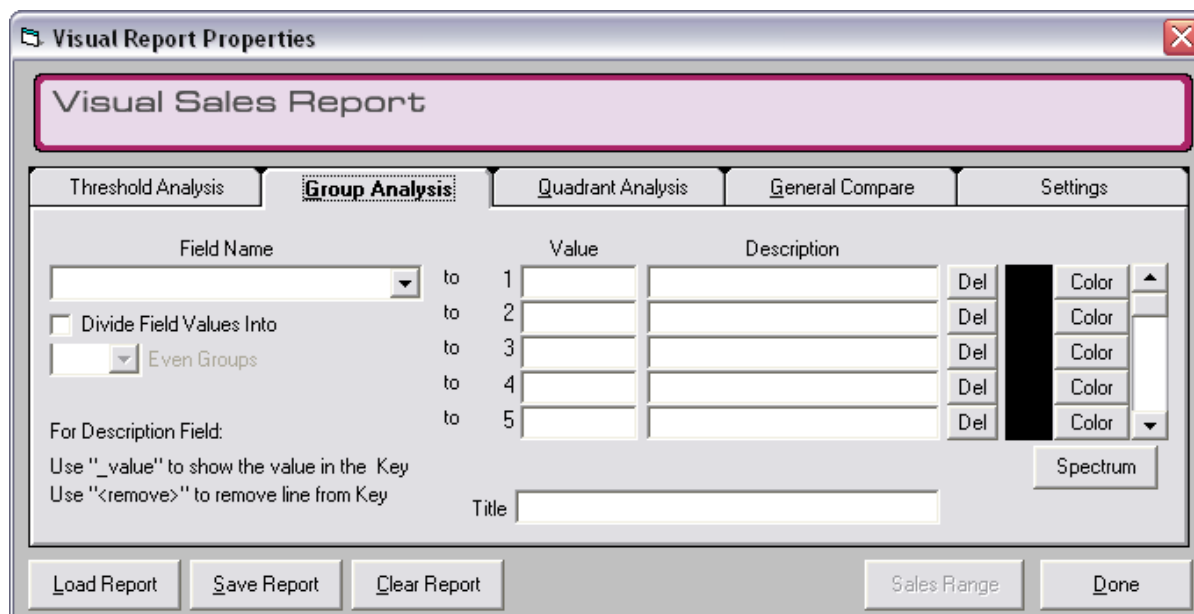


**Note:** The Display Item Text (View-Display\_Show Item Text) option must be on to see any text on a product box.

And now on to the other Visual Reports.

## Group Analysis Report

The 2<sup>nd</sup> tab on the Visual Report Properties has the *Group Analysis* report, as shown in the figure below.



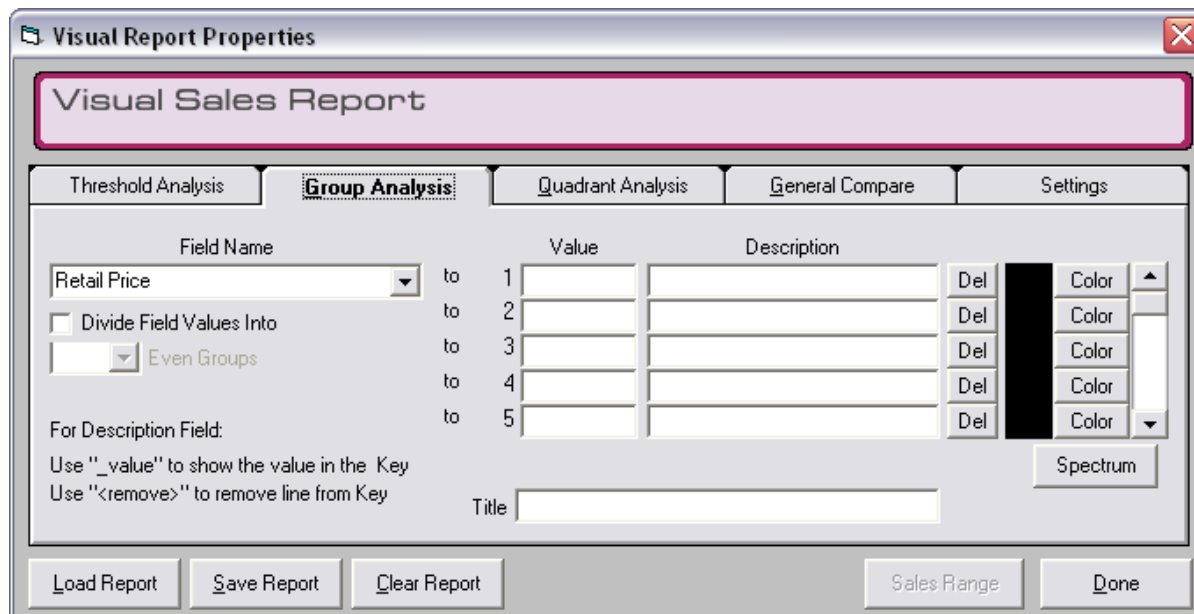
The image shows the 'Visual Report Properties' dialog box with the 'Group Analysis' tab selected. The title bar reads 'Visual Report Properties' and the main title is 'Visual Sales Report'. The tabs are 'Threshold Analysis', 'Group Analysis', 'Quadrant Analysis', 'General Compare', and 'Settings'. The 'Field Name' dropdown is empty. The 'Value' column has five rows with values 1 through 5. The 'Description' column has five empty text boxes. To the right of the 'Value' column are five 'Del' buttons and a 'Color' column with five color selection buttons. Below the 'Value' column is a 'Spectrum' button. The 'Divide Field Values Into' checkbox is unchecked, and the 'Even Groups' dropdown is set to 'Even Groups'. The 'For Description Field:' section contains instructions: 'Use "\_value" to show the value in the Key' and 'Use "<remove>" to remove line from Key'. The 'Title' field is empty. At the bottom are buttons for 'Load Report', 'Save Report', 'Clear Report', 'Sales Range', and 'Done'.

Field Name	Value	Description
	1	
	2	
	3	
	4	
	5	

This report groups values together and is intended to show a range of values in a range of colors. You can define your own group limits or have Shelf Logic automatically divide the values into a certain number of even groups.

### Field Name

To configure a Group Analysis report, first select the field on which the values will be based. Use the drop-down box to select a field. For this example, let's use the product's Retail Price for the field.



The image shows the 'Visual Report Properties' dialog box with the 'Group Analysis' tab selected. The title bar reads 'Visual Report Properties' and the main title is 'Visual Sales Report'. The tabs are 'Threshold Analysis', 'Group Analysis', 'Quadrant Analysis', 'General Compare', and 'Settings'. The 'Field Name' dropdown is now set to 'Retail Price'. The 'Value' column has five rows with values 1 through 5. The 'Description' column has five empty text boxes. To the right of the 'Value' column are five 'Del' buttons and a 'Color' column with five color selection buttons. Below the 'Value' column is a 'Spectrum' button. The 'Divide Field Values Into' checkbox is unchecked, and the 'Even Groups' dropdown is set to 'Even Groups'. The 'For Description Field:' section contains instructions: 'Use "\_value" to show the value in the Key' and 'Use "<remove>" to remove line from Key'. The 'Title' field is empty. At the bottom are buttons for 'Load Report', 'Save Report', 'Clear Report', 'Sales Range', and 'Done'.

Field Name	Value	Description
Retail Price	1	
	2	
	3	
	4	
	5	

## Title

This is the report title that will appear in the Sale Color Key.

## Value

The next step is to choose the values used to form the groups.

The screenshot shows the 'Visual Report Properties' dialog box with the 'Group Analysis' tab selected. The title bar reads 'Visual Report Properties'. The main title area contains 'Visual Sales Report'. Below this are five tabs: 'Threshold Analysis', 'Group Analysis' (selected), 'Quadrant Analysis', 'General Compare', and 'Settings'. The 'Group Analysis' tab contains a table with columns 'Field Name', 'Value', and 'Description'. The 'Field Name' is set to 'Retail Price'. The 'Value' column has five rows with values 1.50, 2.50, 3.50, 5.00, and 10.00. The 'Description' column is empty. To the right of the table are 'Del' buttons for each row and a 'Color' column with a scroll bar. Below the table, there are instructions for the description field: 'Use "\_value" to show the value in the Key' and 'Use "<remove>" to remove line from Key'. A 'Title' field is also present. At the bottom are buttons for 'Load Report', 'Save Report', 'Clear Report', 'Sales Range', and 'Done'.

Field Name	Value	Description
Retail Price	1 1.50	
	2 2.50	
	3 3.50	
	4 5.00	
	5 10.00	

In the first group, the limit is 1.50, which means that all products with a retail price up to 1.50 will be in the first group. The second group is 2.50 meaning that products with a retail price of 1.50 up to 2.50 are in this second group. In the third group, products with a retail of 2.50 up to 3.50 will be included and so on.

We've created 5 groups here but you can create up to 20 groups. Use the scroll bar on the right to scroll up and down through the values.

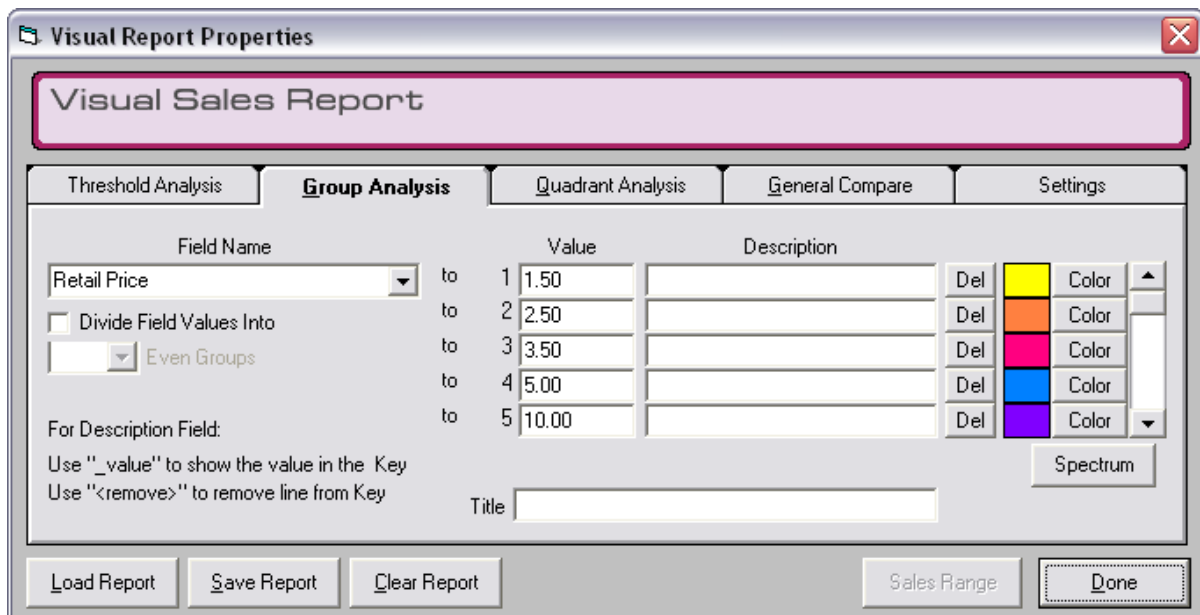
## Description

For each of these values, you can enter a description for this group as you wish. This is displayed in the Sales Color Key window. If you make a mistake, you can use the *Del* button to remove the values from the group report. If you want the value to print in the description, enter “\_value” and the actual value will be printed in its place.

If you don't want the line with this description displayed, enter “<remove>” (without the quotes) for the description.

## Group Colors

The next step is to define the colors that will represent each group. Click on the *Color* button next to the Description and choose a color for the group.



**Visual Report Properties**

**Visual Sales Report**

Threshold Analysis | **Group Analysis** | Quadrant Analysis | General Compare | Settings

Field Name		Value	Description	Del	Color
Retail Price	to 1	1.50		Del	Yellow
	to 2	2.50		Del	Orange
	to 3	3.50		Del	Pink
	to 4	5.00		Del	Blue
	to 5	10.00		Del	Purple

☐ Divide Field Values Into

For Description Field:  
 Use "\_value" to show the value in the Key  
 Use "<remove>" to remove line from Key

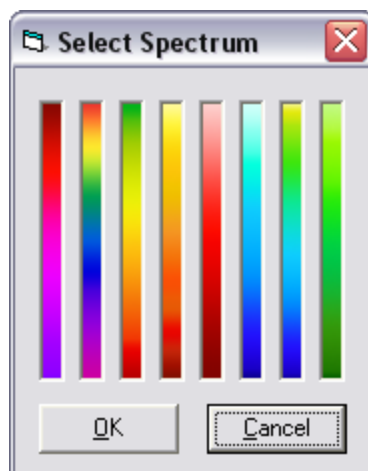
Title:

Above we've selected colors for each of the 5 groups.

## Choosing Group Colors Automatically

### Spectrum

There's another way to select colors for the groups in one step. It's to use the Spectrum button to display several preselected color ranges for you to use as the group colors. When the Spectrum button is clicked, the Select Spectrum window will be displayed, as shown in the figure below.



Click on any of the color and click OK or just double-click on a color bar to select that range of colors. Let's click on the last bar, the green color bar at the right of the window

**Visual Report Properties**

**Visual Sales Report**

Threshold Analysis **Group Analysis** Quadrant Analysis General Compare Settings

Field Name: Retail Price to Value: 1 1.50 Description: Del Color

☐ Divide Field Values Into Even Groups

For Description Field:  
Use "\_value" to show the value in the Key  
Use "<remove>" to remove line from Key

Title:

Load Report Save Report Clear Report Sales Range Done

In the figure above, we've chosen the last color bar for the group colors. The color of each group is automatically determined and displayed. When this report is saved and run, it will look like the figure below.



The products are colored a range of colors as described in the Sales Color Key window displayed above.

If you notice, the products on the bottom shelf are colored black. This is because they didn't fit into any of the defined groups. The last group was up to 10.00 and the products on the bottom shelf are more than 10.00 so they didn't fit into any group.

One way to prevent this is to let Shelf Logic to select the group values.

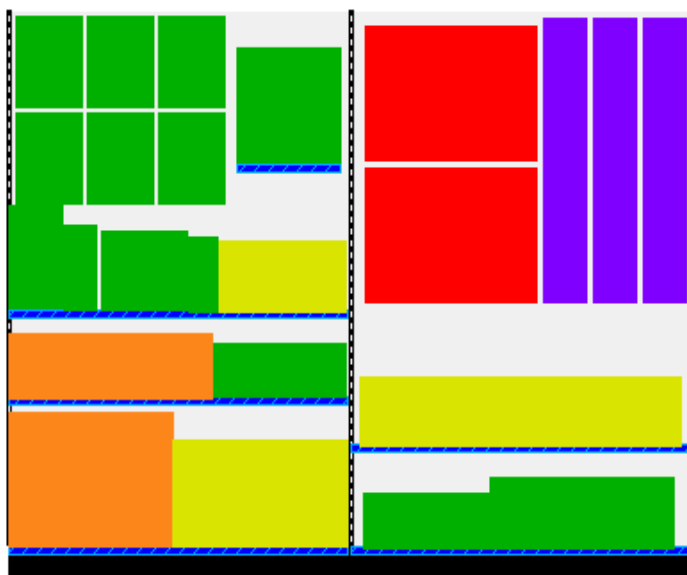
## Choosing Group Values Automatically

### Divide Field Values Into

You can let Shelf Logic select the group values by even dividing the values into a selected number of groups.. Click on the *Divide Field Values Into* checkbox and then enter the number of groups (from 1 to 20) you want to create. Here we've entered 5 groups, as shown in the figure below.

The dialog box is titled "Visual Report Properties - sample". It has a tabbed interface with the following tabs: Threshold Analysis, **Group Analysis**, Quadrant Analysis, General Compare, and Settings. The "Group Analysis" tab is active. It contains a "Field Name" dropdown set to "Retail Price", a "Value" column with 5 groups (Group1 to Group5), and a "Description" column. A checkbox "Divide Field Values Into" is checked, and a dropdown "5" is selected next to "Even Groups". Below this, it says "For Description Field: Use \"\_value\" to show the value in the Key" and "Use \"<remove>\" to remove line from Key". To the right of the groups, there are "Del" buttons and color swatches for each group. A "Spectrum" button is also present. At the bottom, there are buttons for "Load Report", "Save Report", "Clear Report", "Sales Range", and "Done".

The value fields can't be calculated until the report is run so the words "Group1", "Group2" etc are used in place of the actual values.. When the report is run, the lowest and highest values are found, and then evenly divided group values can be defined and products colored according to them, as shown in the figure below.



The "Sales Color Key" dialog box shows the color mapping for the report. It lists five categories with their corresponding colors: Green for "Retail Price to \$5.59", Yellow for "Retail Price to \$10.39", Orange for "Retail Price to \$15.19", Red for "Retail Price to \$19.99", and Purple for "Retail Price to \$24.79". A "Stop Report" button is at the bottom.

The Sales Color Key shows the actual group values selected by the program. The first group of products have a retail price up to 2.60, the second group is from 2.60 up to 5.20 and so on. This way, all products are colored.

When calculating the value for each group, the range between the lowest and highest values are divided into the number of groups selected. In the example above, the lowest cost was 0, so the range of prices was between 0 and 12.99.

If the least expensive product was 5 dollars and the most expensive was 10 dollars, and 5 groups were selected, then the range would be 10-5 divided by 5, which would be one. SO the first group would be from 5.00 up to 6.00 (same as 5.99) , the next is from 6.00 up to 7.00, 7 up to 8, 8 up to 9 and 9 up to 10.

## Description

If you enter a description for a group, it's displayed along side the color on the Sales Color Key. Without a description, the default description is used.

The screenshot shows a software window titled "Visual Report Properties - sample". Inside, there's a tabbed interface with five tabs: "Threshold Analysis", "Group Analysis" (which is selected), "Quadrant Analysis", "General Compare", and "Settings". The "Group Analysis" tab contains a table for defining price groups. On the left, there's a "Field Name" dropdown set to "Retail Price", a checked checkbox "Divide Field Values Into", and a value of "5" for "Even Groups". Below this, instructions for the "Description Field" are provided. The main table has columns for "Value" and "Description". It lists five groups: Group1 (Lowest Price), Group2, Group3, Group4, and Group5. To the right of the table is a "Color" column with a color key (green, yellow, orange, red, purple) and a "Del" button for each row. A "Spectrum" button is also present. At the bottom, there are buttons for "Load Report", "Save Report", "Clear Report", "Sales Range", and "Done".

Field Name	Value	Description	Del	Color
Retail Price	1 Group1	Lowest Price	Del	Green
	2 Group2		Del	Yellow
	3 Group3		Del	Orange
	4 Group4		Del	Red
	5 Group5		Del	Purple



Here we've entered "Lowest Price" as the description. When the report is run. The description for the first group is displayed on the Sales Color Key, as shown in the figure below.



There are no descriptions for the other groups so the default description is used.

### ***Including Value in Description***

If you want to include the comparison value in the description, you put the word "\_value" where you want the actual comparison value to go.

If the second group description is "Lowest Price up to value", then when displayed on the Sales Key, the "\_value" is replaced by the actual value and might look like:



## Quadrant Analysis

The 3<sup>rd</sup> tab is the Quadrant Analysis report, as shown in the figure below.

The screenshot shows the 'Visual Report Properties' dialog box with the 'Quadrant Analysis' tab selected. The dialog has a title bar 'Visual Report Properties' and a close button. Below the title bar is a tabbed interface with five tabs: 'Threshold Analysis', 'Group Analysis', 'Quadrant Analysis' (selected), 'General Compare', and 'Settings'. The 'Quadrant Analysis' tab contains the following controls:

- Field Name:** Two dropdown menus for 'Field 1' and 'Field 2'.
- Midpoint:** Two text input fields for 'Field 1' and 'Field 2'.
- Comparison Type:** Three radio buttons for 'Constant' (selected), 'Average', and 'Midpoint' for both Field 1 and Field 2.
- Title:** A text input field.
- Color Selection:** Four color selection buttons (black squares) labeled 'Color' for each quadrant.
- Descriptions:** Four text input fields for descriptions, with labels 'Field1>= Field2<=' and 'Field1< Field2>=' for the top and bottom quadrants.

At the bottom of the dialog are five buttons: 'Load Report', 'Save Report', 'Clear Report', 'Sales Range', and 'Done'.

This compares two fields and two field values into 4 groups, or quadrants. Each quadrant should have a color assigned to it.

### **Field Name**

You can choose two fields used for the analysis. Let's pick the product's retail price and cost fields.

### **Midpoint**

This is the value to be used in the compare. Colors are defined as below and above this value. Let's go about midway in their values, which should be about 5 for the retail price and about 2.50 for the cost. We enter 5.00 for the Comparison Value for Retail Price and 2.50 for Cost, as shown in the figure below.

**Visual Report Properties**

**Visual Sales Report**

Threshold Analysis | Group Analysis | **Quadrant Analysis** | General Compare | Settings

Field Name	Midpoint	Constant	Average	Midpoint
Field 1: Retail Price	5.00	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Field 2: Cost	5.00	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Title: Cost vs Retail Price

Description	Field1 >= Field2	Field1 < Field2	Field1 < Field2	Field1 >= Field2
	Field1 >= Field2	Field1 < Field2	Field1 < Field2	Field1 >= Field2

Buttons: Load Report, Save Report, Clear Report, Sales Range, Done

Here we enter a constant (5.00) for each midpoint. We can also indicate an average (mean) or midpoint (median) for the midpoint. This makes it useful for all plans since 5.00 might not be the midpoint of all of them.

Colors are also selected and with the entry of our title, we're ready to save the report for later use.

### Description

If you enter a description for a quadrant, it's displayed along side the color on the Sales Color Key. Without a description, the default descriptions are used, as shown below.

**Sales Color Key**

Cost vs Retail Price

- Yellow: Retail Price >= 5.00
- Yellow: Cost < 5.00
- Orange: Retail Price >= 5.00
- Orange: Cost >= 5.00
- Cyan: Retail Price < 5.00
- Cyan: Cost < 5.00
- Green: Retail Price < 5.00
- Green: Cost >= 5.00





Stop Report

With descriptions, as shown below,

**Visual Report Properties - Cost vs Retail**

**Visual Sales Report**

Threshold Analysis | Group Analysis | **Quadrant Analysis** | General Compare | Settings

Field Name	Midpoint		
Field 1 Retail Price	5.00	 Color	 Color
Field 2 Cost	2.50	Description	Description
		High Price Low Cost	High Price High Cost
		Low Price Low Cost	Low Price High Cost
		 Color	 Color

Title Cost vs Retail Price

Load Report | Save Report | Clear Report | Sales Range | Done

There will be 4 description lines, as shown below. Not the 8 default description lines shown above.

**Sales Color Key**

Cost vs Retail Price

-  High Price Low Cost
-  High Price High Cost
-  Low Price Low Cost
-  Low Price High Cost

Stop Report

As with the Group Report, you can include “\_value” in the description and it will be replaced by the actual value. You can also put “<remove>” in the description in order for it not to display.

## General Compare

The 4th tab is the General Compare Report, as shown in the figure below.

The screenshot shows the 'Visual Report Properties' dialog box with the 'General Compare' tab selected. The dialog has a title bar with a close button. Below the title bar is a tabbed interface with five tabs: 'Threshold Analysis', 'Group Analysis', 'Quadrant Analysis', 'General Compare' (selected), and 'Settings'. The 'General Compare' tab contains a table with five rows, each with columns for 'Field Name', 'Comparison', 'Value', and 'Description'. To the right of the 'Description' column are 'Del' and 'Color' buttons. Below the table, there is a text area for 'For Description Field:' with a hint 'Use "\_value" to show the value in the Key'. A 'Title' text box is also present. At the bottom of the dialog are buttons for 'Load Report', 'Save Report', 'Clear Report', 'Sales Range', and 'Done'.

	Field Name	Comparison	Value	Description	Del	Color
1					Del	Color
2					Del	Color
3					Del	Color
4					Del	Color
5					Del	Color

For Description Field:  
Use "\_value" to show the value in the Key

Title

Load Report Save Report Clear Report Sales Range Done

The General Compare Analysis lets you compare multiple fields to values, or the same field to multiple values. For example, you could color each category a different color. Or identify products with a low profit return.

### Field Name

Choose a field name from the list that will be used for the comparison. Up to 20 fields can be used.

### Comparison

This is the kind of comparison being made, such as *equal to*, *more than*, *not equal to*, etc. Choose a comparison from the list.

### Value

This is the value to compare against the field.

### Description

This optional description is used to make a custom description that will appear in the Sales Color Key window. You can include “\_value” in the description and it will be replaced by the actual value.

### Del

Click on this to remove this comparison.

### Color

Click to choose a color for this comparison.

Let's do an example where we assign a color to each category.

**Visual Report Properties**

Visual Sales Report

Threshold Analysis | Group Analysis | Quadrant Analysis | **General Compare** | Settings

	Field Name	Comparison	Value	Description	Del	Color
1	Category	=	grocery		Del	Color
2	Category	=	housewares		Del	Color
3	Category	=	baby		Del	Color
4					Del	Color
5					Del	Color

For Description Field:  
Use "\_value" to show the value in the Key

Title: Categories

Load Report | Save Report | Clear Report | Sales Range | Done

We've created three groups and used "Category" for each field compare. In this report, products with a category of "grocery" are colored blue, products with a category of "housewares" are colored purple, and products with a category of "baby" are colored light green.

When run, the report will look like.



The Key is displayed on the right. We've used the outline option so we can see what the product looks like.

## Section 12 – Category Management Reporting

The Category Management Module consists of several features and reporting capabilities to better identify and work with categories.

### Category Identification

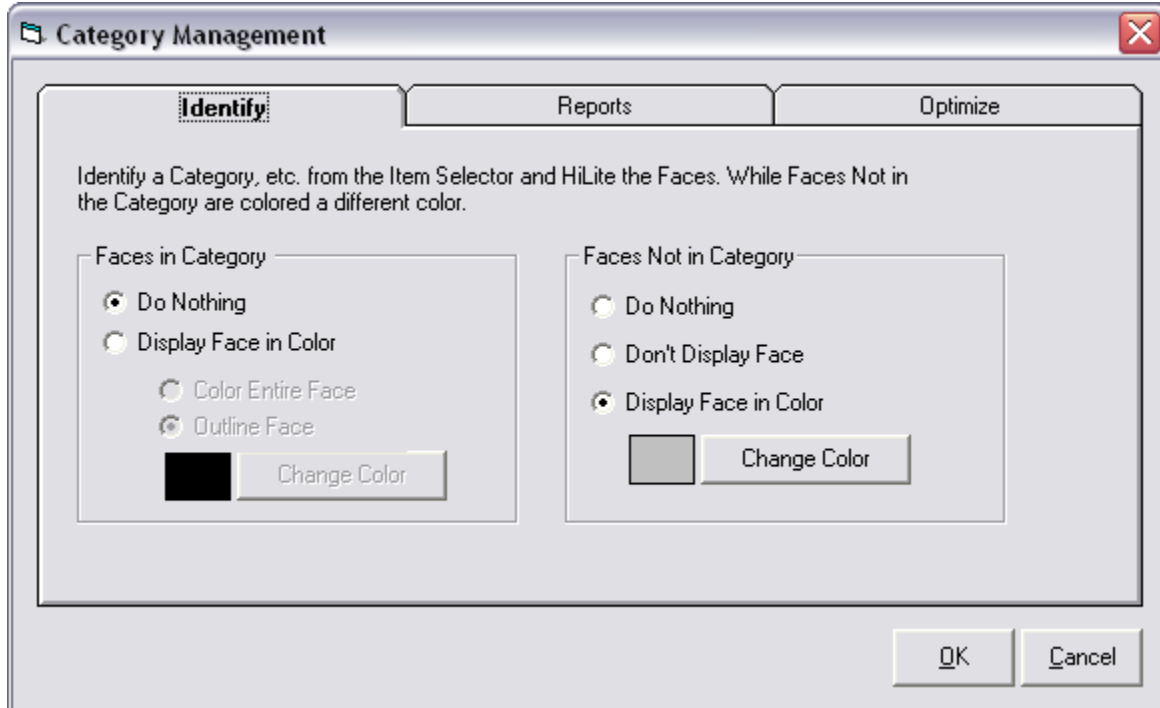
The Category Management Module has several features designed to identify categories in your plan.

### Configure Identification Options

When using the “View Category List” command from the Category Management sub menu, specific categories are colored so they stand out. The Identify tab in the Category Management screen (shown below) controls this highlighting.

#### Identify

The first tab of the Category Management window is the *Identify* tab, as shown in the figure below.



This will let you color products on the belonging to a category. The window above lets you control the color of the products in the category and how to display the product not in the category.

## ***Faces in Category***

This controls how the products in the category are displayed.

### **Do Nothing**

The product remains the same. This is used with the “Don’t Display Face” option for the “Faces Not in Category” so the only products displayed on the plan belong to the category.

### **Display Face in Color**

This will display a color on the product face. The *Change Color* button lets you specify the desired color.

### **Color Entire Face**

The entire product face is colored in.

### **Outline Face**

A colored outline is drawn around the product. You can choose the color.

## ***Faces Not in Category***

This controls what’s done to the faces not in the category.

### **Do Nothing**

If this option is chosen, nothing is done to the faces not in the category.

### **Don’t Display Face**

If this option is chosen, the products not in the category are not displayed on the screen.

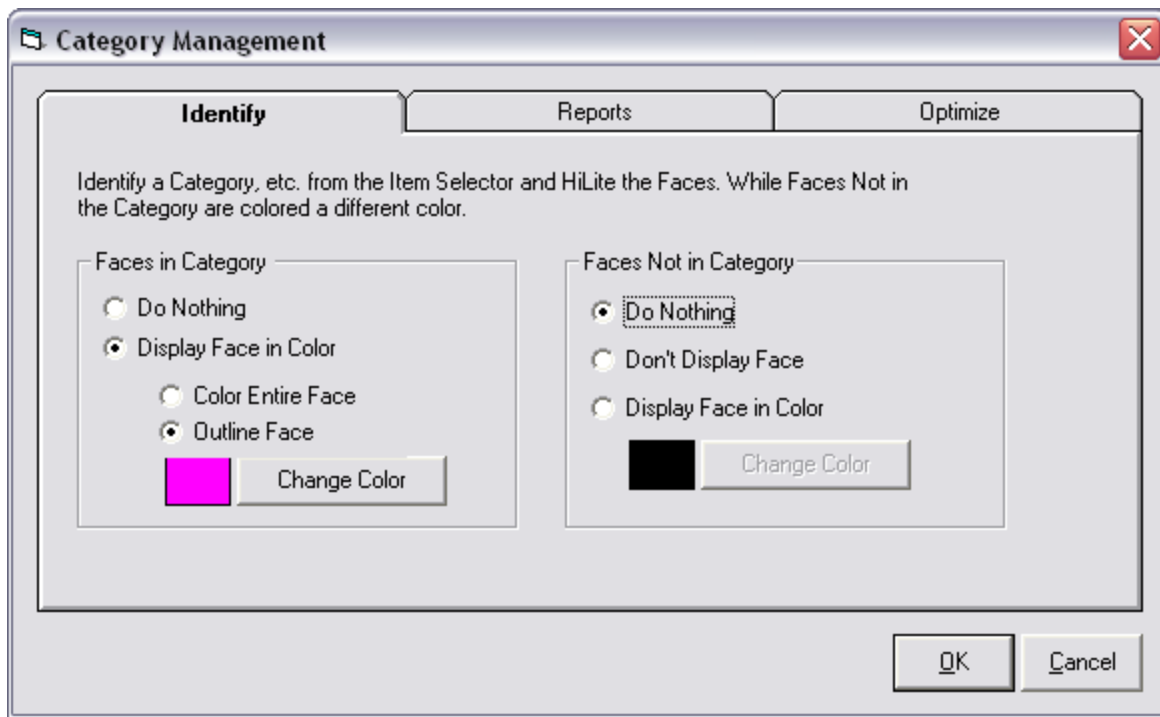
### **Display Face in Color**

If this option is chosen, the products not in the category are not displayed in the color chosen

Let’s look at the various combinations you can create to view and identify categories.

We’ll start by coloring faces in the category and doing nothing to the faces not in the category, as shown in the figure below.



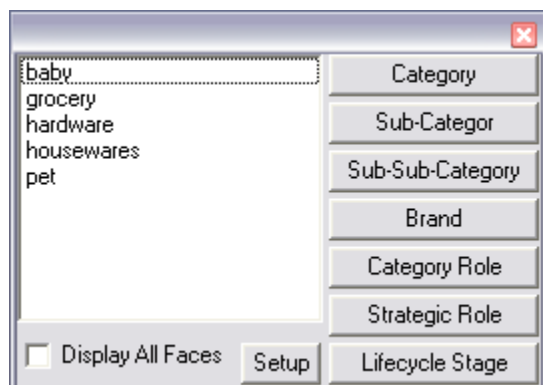


We'll click OK and this will be stored and used until it's changed.

## View Category Identities

To view and identify the categories, you first need to display the *Category List*. This is done using the Sales menu, select “Category Management” and then select “View Category List”.

You will then see the Category List window, as shown in the figure below.



This window shows you all of the categories on this plan. By clicking on any category on the list, that category will be highlight. By clicking on the “baby” category, the first line in the list, the product faces in the baby category will be highlighted, as shown in the figure below.

### ***Option: Color Product on Plan, Others Remain the Same***



You can easily see the baby product on the plan. The options for this is that products in the baby category are outlined in the magenta color, the other products are left untouched.

If we now click on the second category on the list, “grocery”, the grocery products are highlighted, as shown in the figure below.



Clicking on “hardware” shows us the hardware category products, as shown in the figure below.



Here are the “Housewares” category products, shown below.



And finally, the “pet” category products, shown below.



### ***Option: Color Product on Plan, Others Aren't Displayed***

When you choose the option to not display the products that aren't in the category, the plan would look like.



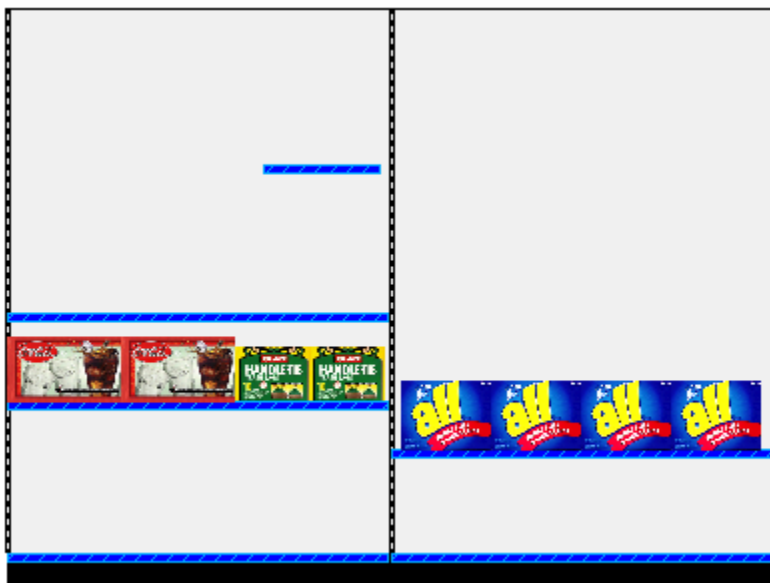
The products in the baby category are shown with a colored outline and the other products not in the category aren't display at all on the plan.

### ***Option: Do Nothing to the Product on Plan, Others Aren't Displayed***

This is similar to the example above, except that no colored outline is drawn around the product.

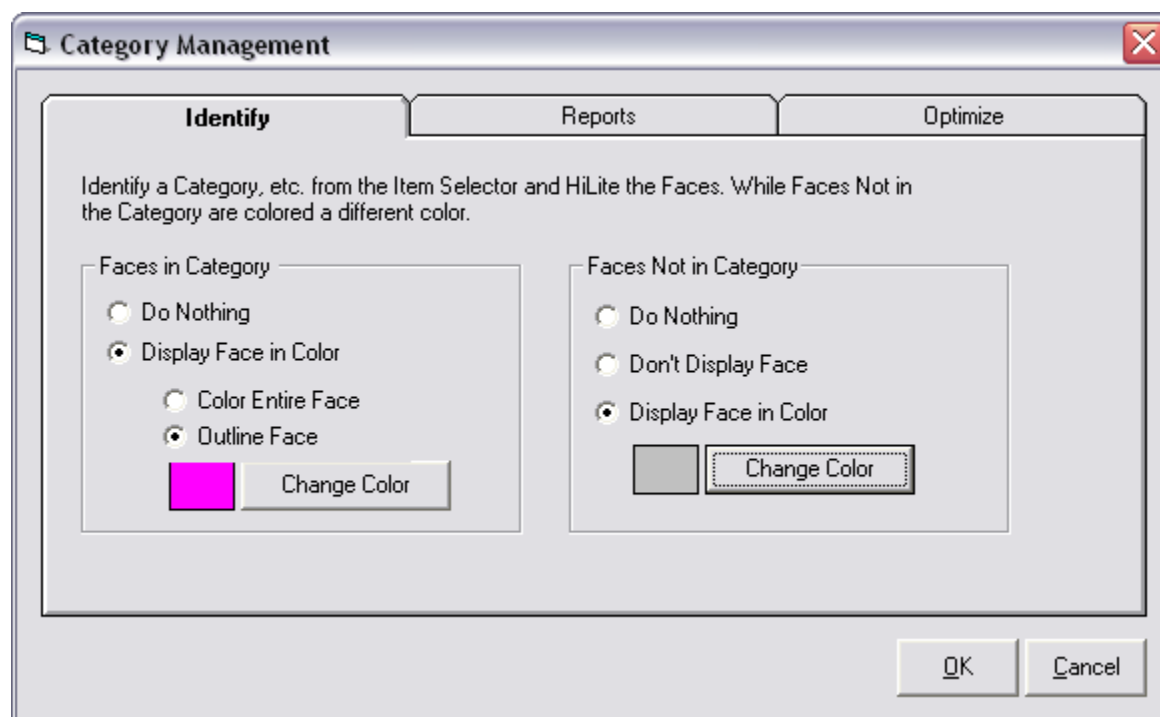


Here, only the baby category products are displayed on the screen. As each category on the Category List is selected another category is viewed. Below is what the plan looks like with the housewares category products selected.



### Option: Color Product on Plan, Others Are Colored Differently

With this option, the products in the selected category are colored and the other products are also colored. This setup is shown in the figure below.



When the baby category is selected from the *Category List*, the plan will look like the figure below.

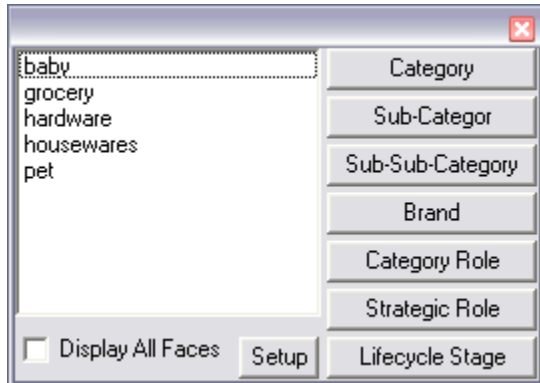


The products no in the baby category are colored light gray.

## View Other Identities

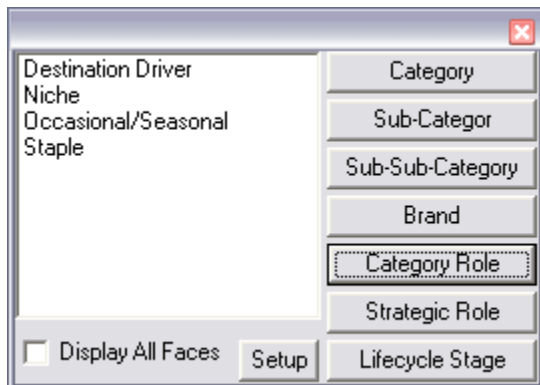
While we've been talking about identifying categories in the example above, you can use other database fields to identify products on the plan.

On the Category List window is not on a button labeled "Category", but buttons for various other fields. By clicking on a button, all values on the plan will be displayed in the list and you can then select one to identify products according to that field.



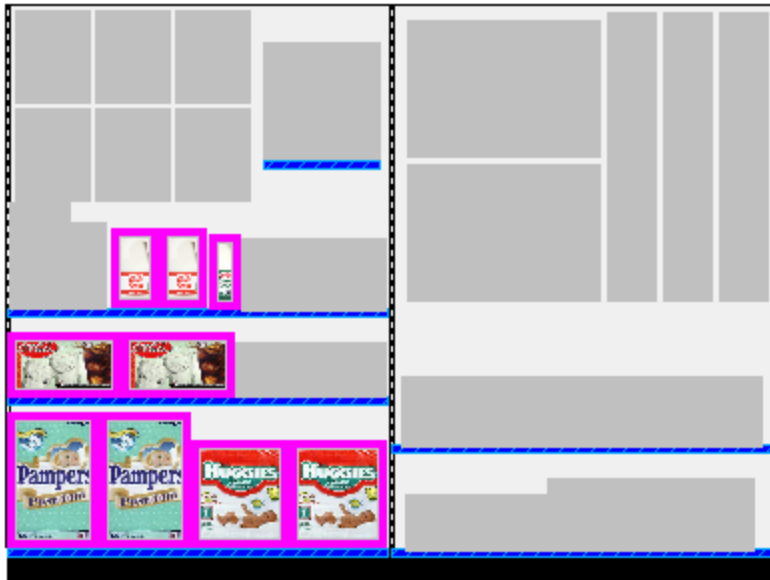
In the Category List window above, the categories are displayed.

When we click on the "Category Role" button, we will see all of the Category Roles that exist on the plan, as shown in the figure below.



No if we click on the first selection, "Destination Driver", we will see all products on the plan that have this Category Role, as shown in the figure below.

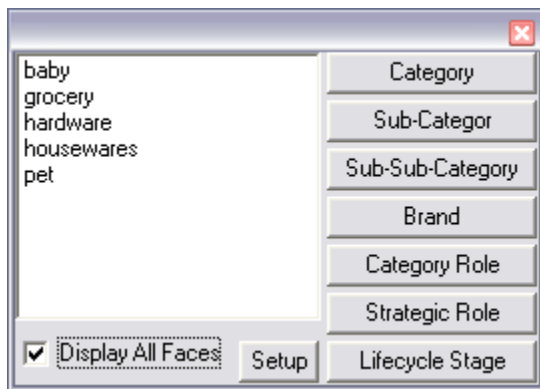




All options that work with the category identification will work with these other fields.

### ***Display All Faces***

Below the list of categories (or whatever field chosen) is a checkbox labeled “Display All Faces”. If you check this, then the identification process will be turned off and all faces will be displayed as normal.



### ***Setup***

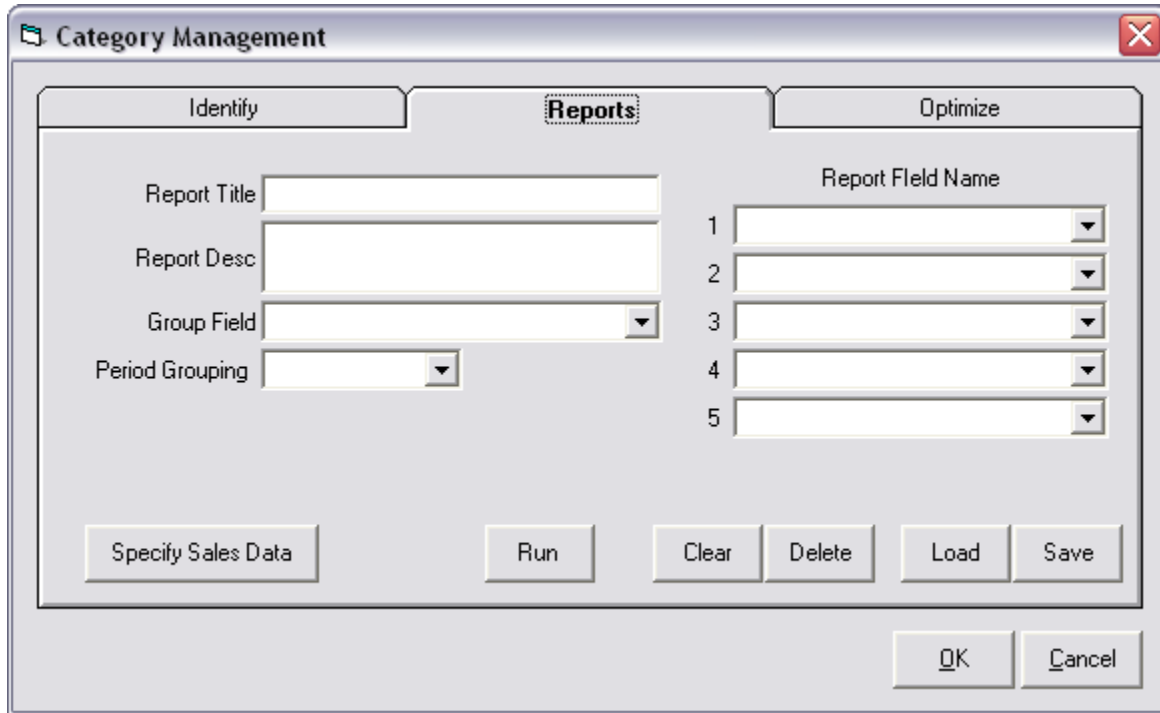
Clicking this button will close this window and open up the Category Management window so you can change the configuration.



# Category Management Reports

## Configuring Category Reports

The 2nd tab on the Category Management window is the *Reports* window, as shown in the figure below.



The screenshot shows a software window titled "Category Management" with a close button in the top right corner. Inside the window, there are three tabs: "Identify", "Reports" (which is selected and highlighted with a dashed border), and "Optimize". The "Reports" tab contains the following fields and controls:

- On the left side:
  - "Report Title" with a text input field.
  - "Report Desc" with a text input field.
  - "Group Field" with a dropdown menu.
  - "Period Grouping" with a dropdown menu.
- On the right side, under the heading "Report Field Name":
  - A list of five numbered dropdown menus, labeled 1 through 5.
- At the bottom of the "Reports" tab, there is a row of buttons: "Specify Sales Data", "Run", "Clear", "Delete", "Load", and "Save".
- At the bottom right of the window, there are "OK" and "Cancel" buttons.

These reports give you a sales and profit picture on a daily, weekly, monthly, quarterly or yearly basis. Sales can be broken into categories, sub-categories, and more. These reports can viewed on the screen but can also by printed, graphed or sent to an Excel file.

### Report Title

This is the title of the report and goes on the top of the screen report window.

### Report Desc

This is the description of the report and goes on the bottom of the screen report window.

### Group Field

This is how sales are broken down, Your choices are:

- Category
- Sub-Category
- Sub-Sub-Category
- Brand
- Category Role
- Strategic Role
- Lifecycle Stage

**Period Grouping**

This lets you group the information into daily, weekly, monthly, etc time periods. The periods can only be for the sales data entered or for a greater time period.

For example, if the sales information is entered on a weekly basis, then you can have weekly reporting, monthly reporting, quarterly and yearly reports. But you can do daily reporting. Likewise, if sales data is entered on a monthly basis, then you can't do a weekly sales report.

**Report Field Name**

You can enter up to fields for the report.

**Run**

This runs the report.

**Clear**

This clears the screen so you can start over.

**Delete**

This lets you delete an existing report.

**Load**

This lets you load an existing report.

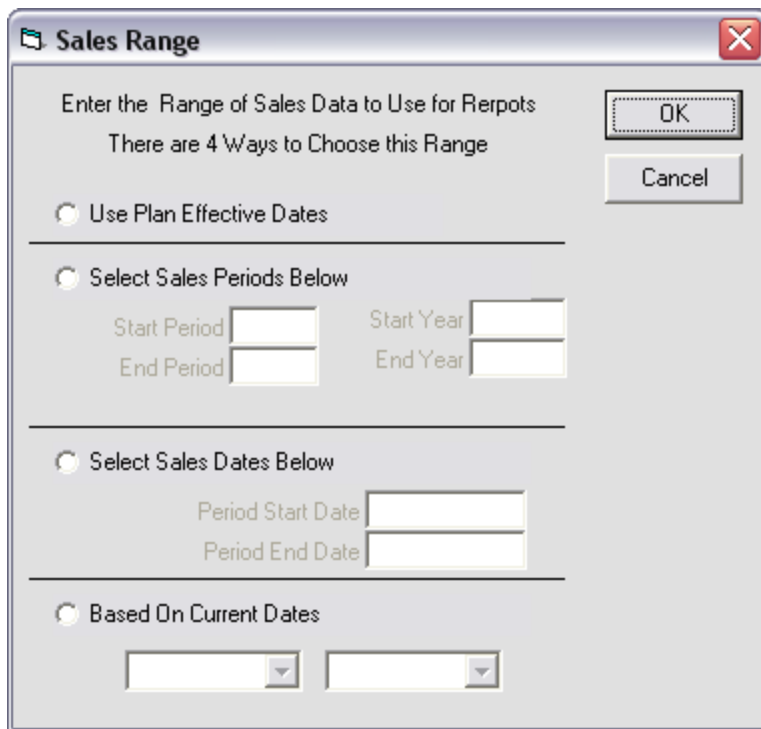
**Save**

This saves a report. All reports must be saved before they can be run.

**Specify Sales Data**

This lets you specify the time range of data desired for the report. You can report on a single time period or several years.

When you click on the Specify Sales Data button, you'll see a window like the figure below.



**Sales Range**

Enter the Range of Sales Data to Use for Reports  
There are 4 Ways to Choose this Range

☐ Use Plan Effective Dates

☐ Select Sales Periods Below

Start Period  Start Year   
End Period  End Year

☐ Select Sales Dates Below

Period Start Date   
Period End Date

☐ Based On Current Dates

OK Cancel

There are 4 ways to select dates for the reports.

#### Use Plan Effective Dates

This uses the effective dates of the plan as defined in the plan property window. It gives you the sales information for the life of the plan.

#### Select Sales Periods Below

This lets you select dates based on sales periods. You can enter the start and end periods and the start and end years.

#### Select Sales Dates Below

This lets you select sales by the starting and ending dates.

#### Based on Current Dates

This lets you base the sales periods on the current date. For example, you could do the previous week, or current month, or three months ago, etc.

If you select this option, the first drop down box has the following choices:

**This** – Current time period

**Previous** – The previous time period

**This-2** – This is two periods back (the period before *previous*)

**This-3** – This is three periods back (the period before *previous*)

**This-4** – This is four periods back (the period before *previous*)

**This-5** – This is five periods back (the period before *previous*)

The second drop down box has the time period. The choices are:

**Day, week, month, quarter, year.**

Reports based on current dates will give different results depending upon when they are run.

Let's look at creating and running a report.

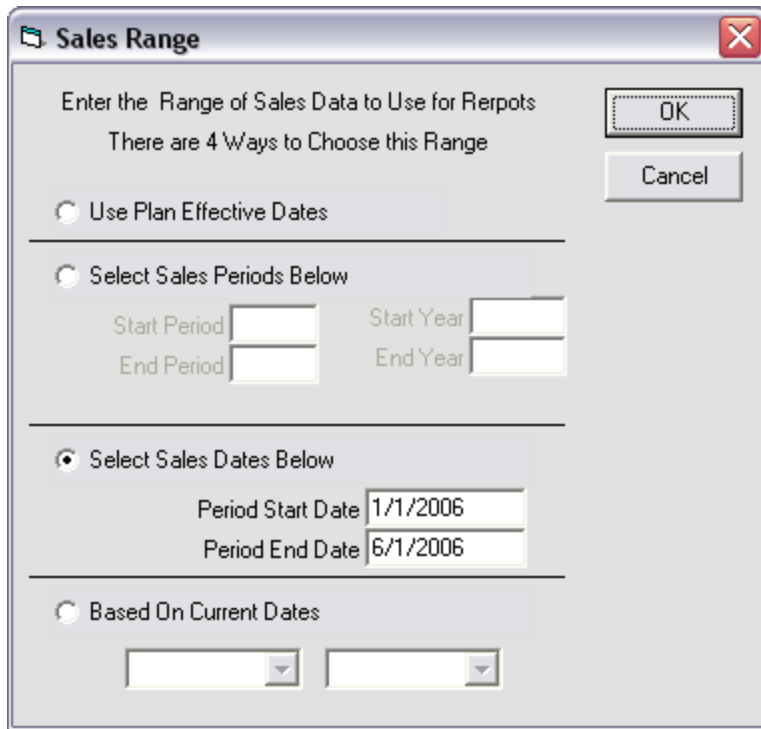
First we'll enter a report title and description. Then we select "Category" for the *Group Field*. This means the sales data on the report will be grouped together by category. The *Period Grouping* chosen is "Week". This means we will get a weekly breakdown on the sales information.

For the information we want to see on the report, we'll choose 3 fields, the "Net Sales", "Units Sold" and "Gross Profit \$".

The report window will look like the figure below.

The screenshot shows a dialog box titled "Category Management" with a close button (X) in the top right corner. The dialog has three tabs: "Identify", "Reports", and "Optimize". The "Reports" tab is currently selected. Inside the "Reports" tab, there are two main sections. The left section contains four input fields: "Report Title" (with text "Report Title"), "Report Desc" (with text "Report Desc"), "Group Field" (a dropdown menu showing "Category"), and "Period Grouping" (a dropdown menu showing "Week"). The right section is titled "Report Field Name" and contains five numbered dropdown menus. The first three are populated with "Net Sales", "Units Sold", and "Gross Profit \$". The fourth and fifth are empty. At the bottom of the dialog, there are several buttons: "Specify Sales Data", "Run", "Clear", "Delete", "Load", "Save", "OK", and "Cancel".

For the time periods, we'll click on the Specify Sales Data button and select a report for the first half of 2006, as shown in the figure below.



The image shows a 'Sales Range' dialog box with a title bar and a close button. The main text reads 'Enter the Range of Sales Data to Use for Repots' and 'There are 4 Ways to Choose this Range'. There are four radio button options: 'Use Plan Effective Dates', 'Select Sales Periods Below', 'Select Sales Dates Below' (which is selected), and 'Based On Current Dates'. The 'Select Sales Periods Below' option has input fields for 'Start Period', 'End Period', 'Start Year', and 'End Year'. The 'Select Sales Dates Below' option has input fields for 'Period Start Date' (containing '1/1/2006') and 'Period End Date' (containing '6/1/2006'). The 'Based On Current Dates' option has two dropdown menus. 'OK' and 'Cancel' buttons are in the top right corner.

Enter the Range of Sales Data to Use for Repots  
There are 4 Ways to Choose this Range

☐ Use Plan Effective Dates

☐ Select Sales Periods Below

Start Period  Start Year   
End Period  End Year

☒ Select Sales Dates Below

Period Start Date   
Period End Date

☐ Based On Current Dates

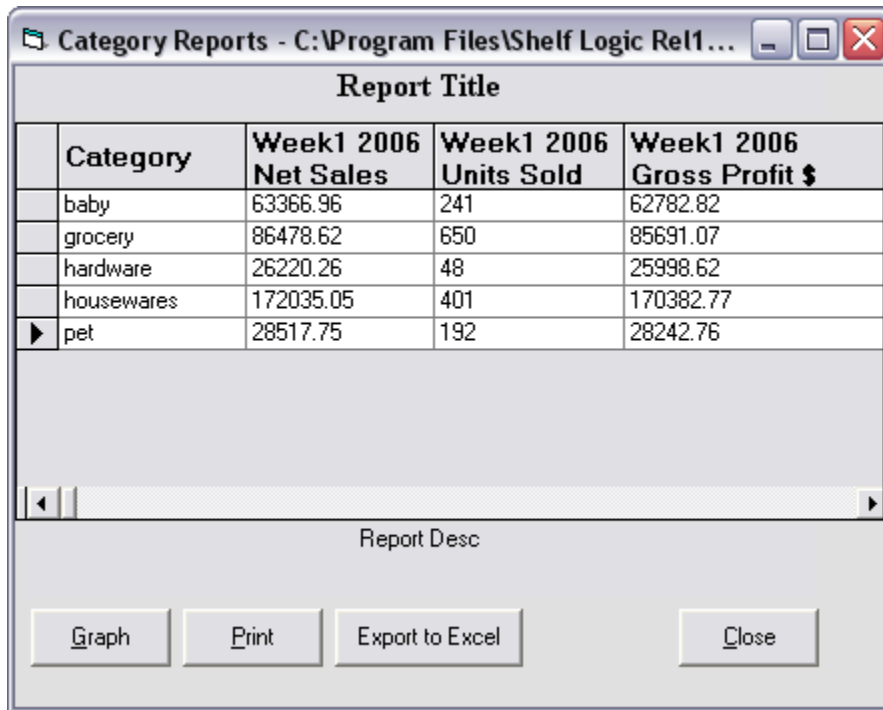
OK  
Cancel

Click OK to save the sales range information. Now we need to save the report. Click on the “Save” button and give the report a name. The report is now ready to run. IT can be run from the Sales menu or you can run it directly from this window, just click on the “Run” button.

## Running the Category Report

Category Reports can be run from the Sales menu. Choose “Category Management” and then “Run Category Mgmt Report” Or the report can be run from the Category Management window, by clicking on the “Run” button.

When run, the report would look like the figure below.



The screenshot shows a window titled "Category Reports - C:\Program Files\Shelf Logic Rel1...". Inside the window, there is a table with the following data:

Report Title				
	Category	Week1 2006 Net Sales	Week1 2006 Units Sold	Week1 2006 Gross Profit \$
	baby	63366.96	241	62782.82
	grocery	86478.62	650	85691.07
	hardware	26220.26	48	25998.62
	housewares	172035.05	401	170382.77
▶	pet	28517.75	192	28242.76

Below the table is a large empty area with a horizontal scrollbar. At the bottom of the window, there are four buttons: "Graph", "Print", "Export to Excel", and "Close".

This report shows, for each category on the plan, the total Net Sales, Unit Sales and Gross Profit \$ per week from Jan 1<sup>st</sup> to the beginning of June. As you scroll to the right, you'll the information for week2, week3 and so on, as shown in the figure below.



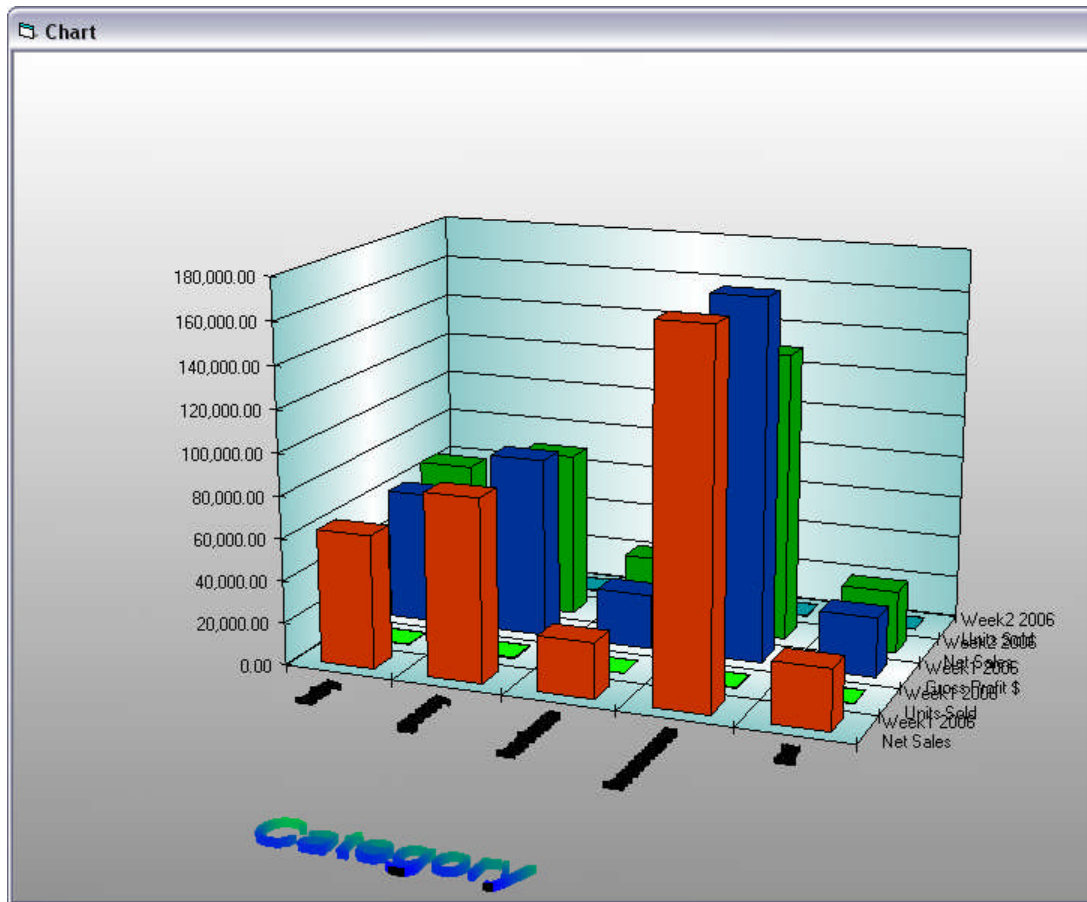
Category Reports - C:\Program Files\Shelf Logic Rel1...

Report Title				
	Week2 2006 Net Sales	Week2 2006 Units Sold	Week2 2006 Gross Profit \$	Week3 2006 Net Sales
▶	68238.21	244	67609.64	70697.93
	78614.05	612	77901.84	79848.39
	32198.89	40	31926.87	37024.65
	137016.86	432	135705.76	131474.98
	29503.63	194	29218.87	30320.71
Report Desc				
<input type="button" value="Graph"/> <input type="button" value="Print"/> <input type="button" value="Export to Excel"/> <input type="button" value="Close"/>				

There are several options available on this window.

## Graph

You can graph the data on a fully rotatable 3D graph, as shown in the figure below. Click the mouse on the graph and move the mouse to move the graph.



You can view the graph of a Category Report from the Sales menu. From the Sales menu, select “Category Management”, then choose “Graph”. You be asked for the name of a Category Report and then graph that report.

## Print

This lets you print the report

## Export to Excel

This will export the report to a comma delimited .CSV style file which will open in Excel.

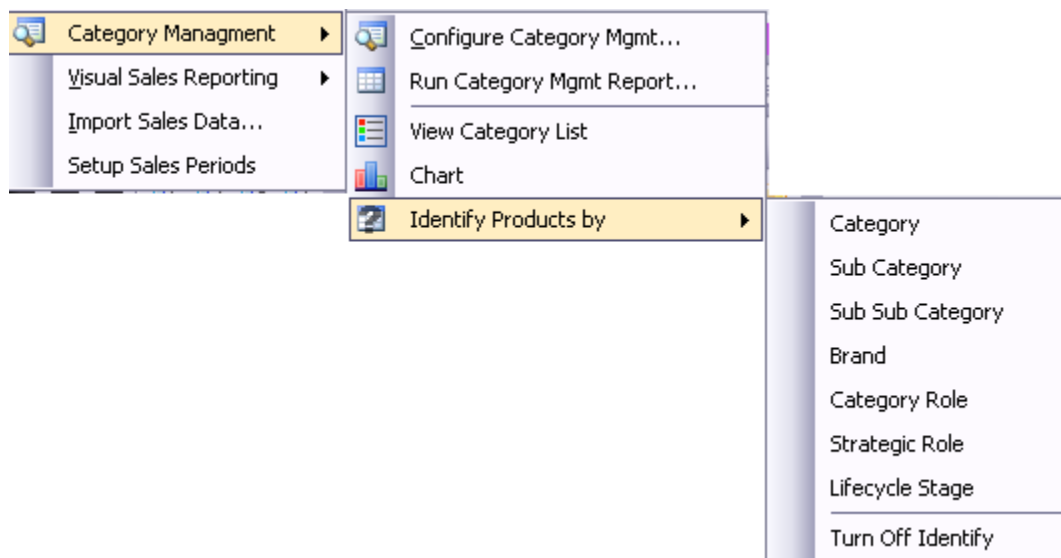
## Close

This closes the report window.

## Identify Products By

The “Identify Product By” command from the Category Management submenu will let you identify products by category, sub category, brand and more by coloring each group a different color.

When you select the “Identify Product By” command, you will see another menu which lets you choose various fields by which to identify the product faces, as shown in the figure below.



Let's choose “Category” and we'll see all the categories colored, as shown in the figure below.



To help identify the color, the Category Color Key (shown on the right of the plan) is displayed so that you can tell what colors are what.

In addition to categories, you can identify, by colors, the sub-category, sub- sub-category, brand, category role, strategic role, and lifecycle stage

Below we display the same plan and identify each brand. The key tells you what each brand is colored.

**Sales Color Key**

- Brand = Pampers
- Brand = Huggies
- Brand = Glad
- Brand = Garelick farms
- Brand = Friendly's
- Brand = Cheerios
- Brand = Coca-cola
- Brand = Land o lakes
- Brand = The first years
- Brand = Stanley
- Brand = All
- Brand = Tidy cat
- Brand = Milkbone

Stop Report

## Generating and Printing Reports

Shelf Logic® Enterprise Edition has several useful reports that can be automatically generated from inside the program. In addition, plan files can be exported into Excel to create custom reports.

All standard reports are accessible from the Report Menu. Sales reports are accessible from the Sales Menu and are covered in Section 13. Upon selecting a report from the menu, the Report dialogue box will open as shown below:

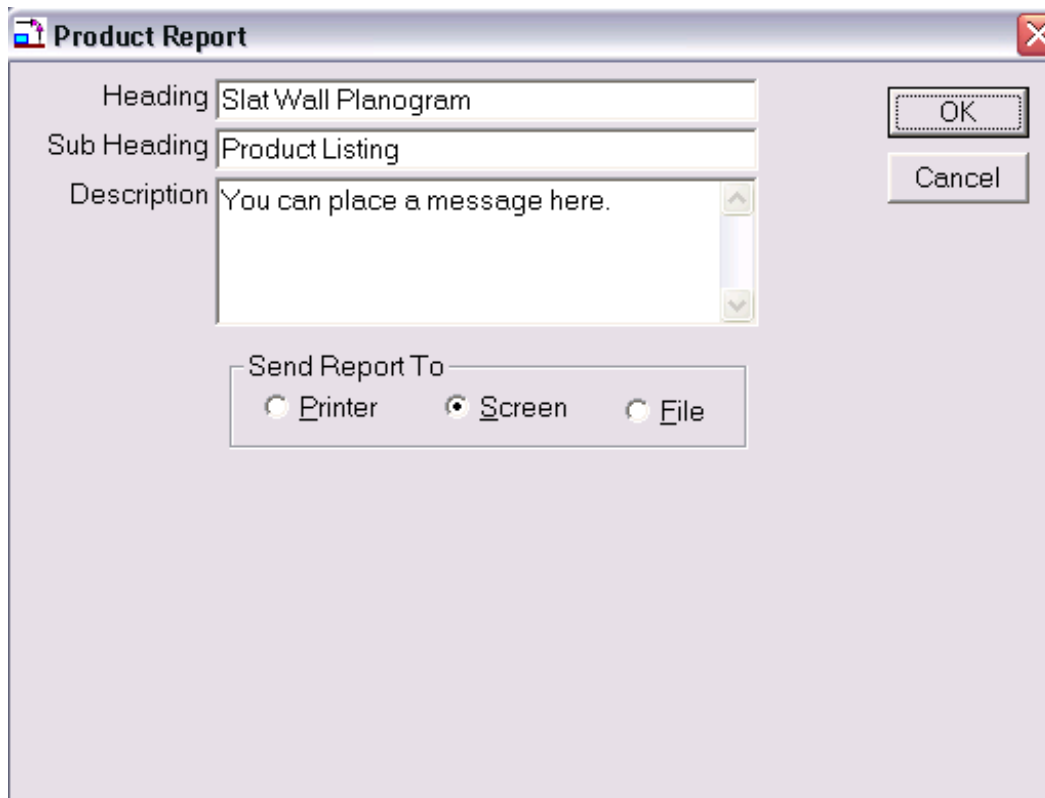


Figure 34. Report Dialogue Box

**Heading** – Enter an optional heading for the report. The heading will appear in large type, centered at the top of the page. This heading will become the default heading for all reports generated from this planogram.

**Sub Heading** – Enter an optional sub heading for the report. The sub heading will appear in slightly smaller type, centered below the heading.

**Description** – Enter an optional report description. The description will appear at the bottom of the report. You can enter up to 50 characters.

**Send Report To** –The report can be viewed on screen, sent to a printer, or printed to a file.

- When printing to the screen, the report will open in a separate window. Use the <Page Up> and <Page Down> keys to scroll through multiple pages
- When selecting the print to file option, enter a path and file name when prompted to do so. The report can be generated to a text or html file, which can be opened and customized in any word processing, spreadsheet, text or web editor application.

# **Standard Reports**

## **Schematic Listing**

This report lists all of the data needed for constructing the shelving.

## **Product Listing**

This report lists all of the items on the planogram with details such as Item Number, Item Name, side number, side dimensions, number in stack, and hook size. This report is used for constructing the display.

## **Space Analysis Report**

This report details how much space is taken up by each item. The report is sorted in order of items with the greatest number of facings. The amount of linear feet, square feet and cubic feet of shelf space for each item is listed, along with the percentage of total shelf space taken up by each item.

## **Financial Report**

This report is sorted by item category and lists Item Name, the quantity on the planogram, markup percentages and profits, percentage of total space used by this item and percentage of profit. This report must be printed in landscape mode.

## **Item File Detail**

This report prints out the items database and all details.

## **Item File Summary**

This report prints out the items database with a summary of the item details.

# Creating Custom Reports

## Export the Plan File to Excel

Menu: File/Export Plan

The Shelf Logic<sup>®</sup> Enterprise Edition planogram file can be exported into an Excel spreadsheet, or other application, for the creation of custom reports.

Upon executing the above command, the Windows File Save dialogue box will open. Select the default location or a new location and enter a file name. The .CSV extension will be added automatically.

When you open the .CSV file in Excel you can rearrange and format the data, add formulas, etc. Save the finished report file as an .XLS file to preserve formatting.

## Custom Report Writer

The Shelf Logic Report is included with the Enterprise Edition. Consult the separate Report Writer Manual for usage instructions.



The Presentation Manager is a facility that lets you combine the plan printout and multiple reports on a single or multiple running pages. You can create up to 10 individual report pages and the last page can repeat as many times as needed until any reports on the last page run their course.

Each report page can have up to 99 ‘objects’. An *Object* can be plain text, any photo image, any report, any Visual Sales Report, any Category Management Report, a plan property, or the plan in front, side or top views.

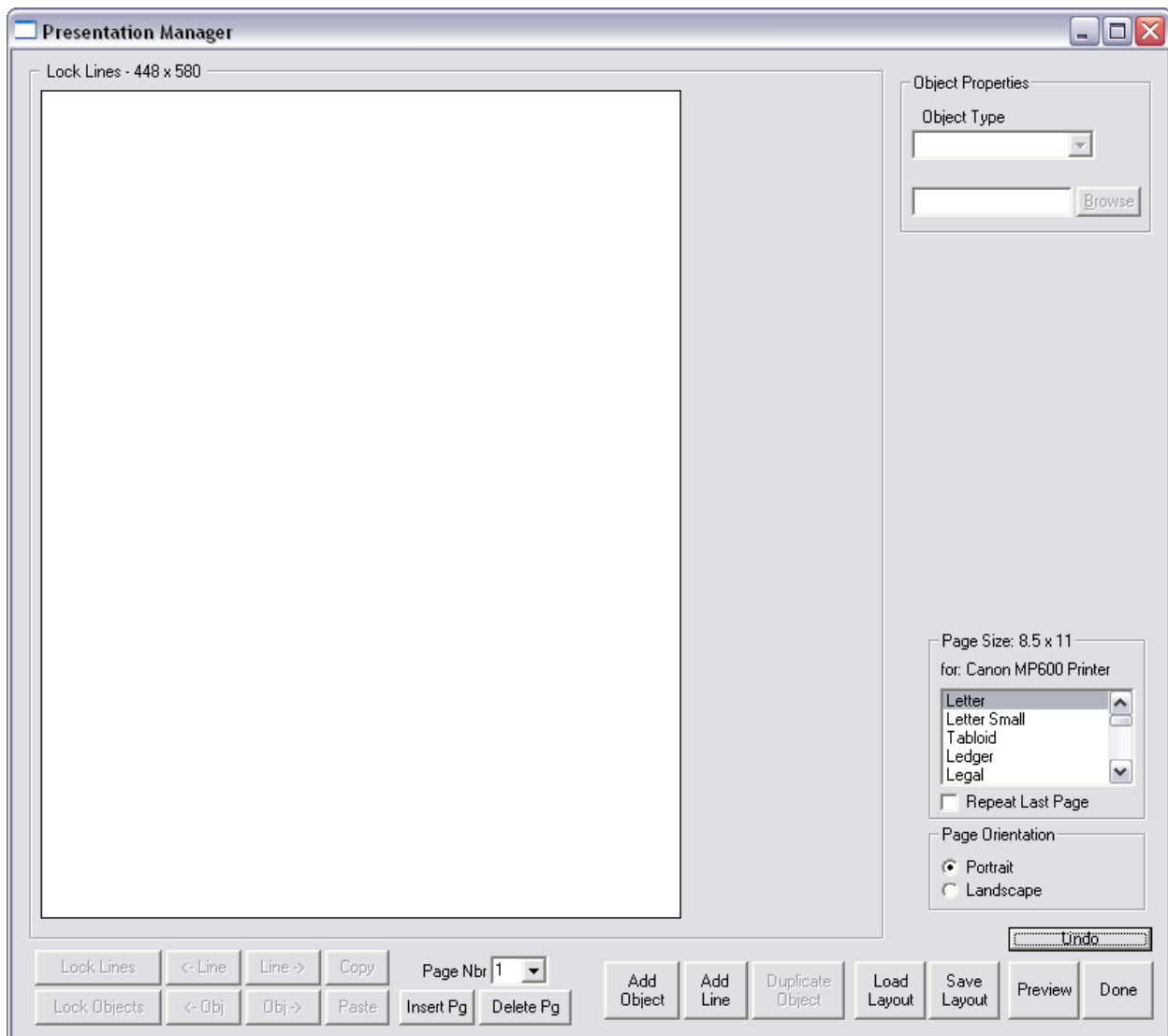
These Objects can be placed anywhere on the page and sized to any shape. In addition, there’s an option to keep repeating the last page if there’s a report that needs to finish. Pages print until the report is finished.

Reports can be started on one page and continued onto another. If the report name is found on more than one object (for example the same report is found on page 1 and 2), then it is continued onto the next object with the same report name.

A Presentation Report can be printed on a wide variety of paper sizes.

### **Configuring a Presentation Report**

From the Reports menu, select “Presentation Manager”, then choose “Create/Change Presentation Report”. You will see the *Presentation Manager* window, as shown in the figure below.

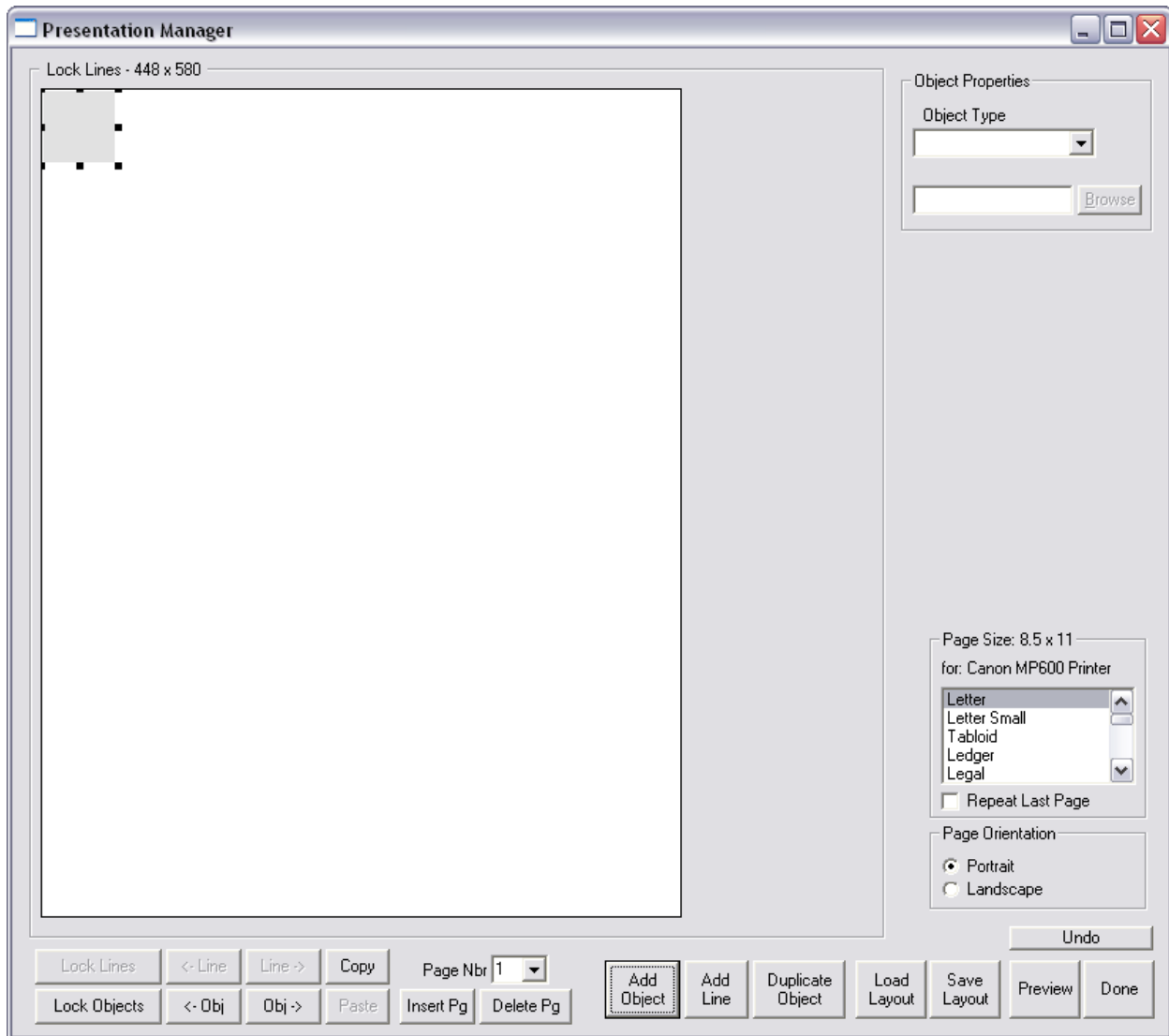


The Presentation Report is basically a layout tool that puts already existing reports and plan views together on the same page. Each report or plan view is considered an *object*. Each *object* can be moved and resized on the printed page.

On the left is a large white window where the report will be composed. This is where the objects will be displayed. It represents the dimensions of a particular paper type. On the right of the window is where you define the size of your paper. As you choose each size, you'll notice the shape of the report page will change to reflect the proportions of the paper size chosen. The page size is also shown along with the currently selected printer

## Adding an Object to the Presentation Report

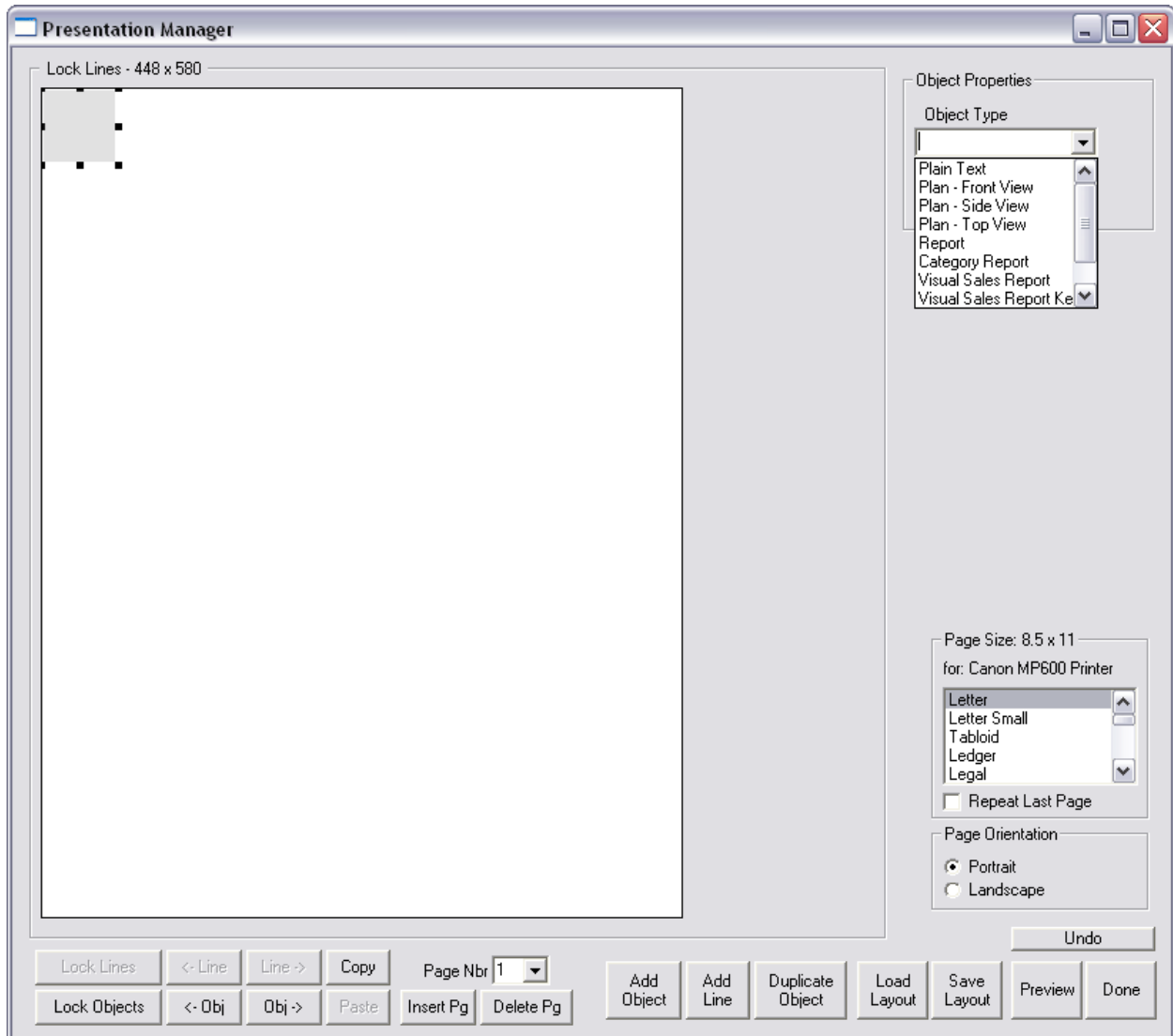
Click on the “Add Object” button to add a new object to the report, as shown in the figure below.



The object is represented by a gray square or rectangle. The small black boxes let you resize the object. Click on any of the small black squares and drag to resize the object. Click inside the object and drag into position. Or you can enter the position by number in the object properties.

## Defining Object Type

Next we'll want to define the type of object just added. This is done in the Object Properties in the upper right of the window. The Object Type drop down has a list of possible objects, as shown in the figure below.



They are:

### **Plain Text**

This lets you just print any text you want with automatic word wrap. The text will fit the shape of the object. There are some special 'words' that can be included in your text. They let you enter a carriage return/line feed (goto the next line), the current page number, and the current time and date. Each is surrounded by "<>" and start with an equal sign.

<=CR>	is a carriage return
<=PAGE>	is the current page number
<=DATE>	is the current date
<=TIME>	is the current time.

Here's a text example:

```
Store #3132<=CR>
Delivery System 3239<=CR>
Routing 33A
```

This text will print on three lines, since there are two carriage returns in the text. We skipped lines for clarity but the text will be entered as:

```
Store #3132<=CR>Delivery System 3239<=CR>Routing 33A
```

### ***Plan – Front View***

This will display the front view of the plan

### ***Plan – Side View***

This will display the side view of the plan

### ***Plan – Top View***

This will display the top view of the plan

### ***Report***

This will print any report created by the report writer. You will need to enter the report name. The *Browse* button will let you search for the report.

### ***Category Report***

This will print a Category Report. You will need to enter the Category Report name. The *Browse* button will let you search for the report.

### ***Visual Sales Report***

This will print a Visual Sales Report. You will need to enter the Visual Sales Report name. The *Browse* button will let you search for the report.

### ***Visual Sales Report Key***

This prints the Color Key used with the Visual Sales Reports to identify the colors used. You will need to enter the Visual Sales Report name. The *Browse* button will let you search for the report.

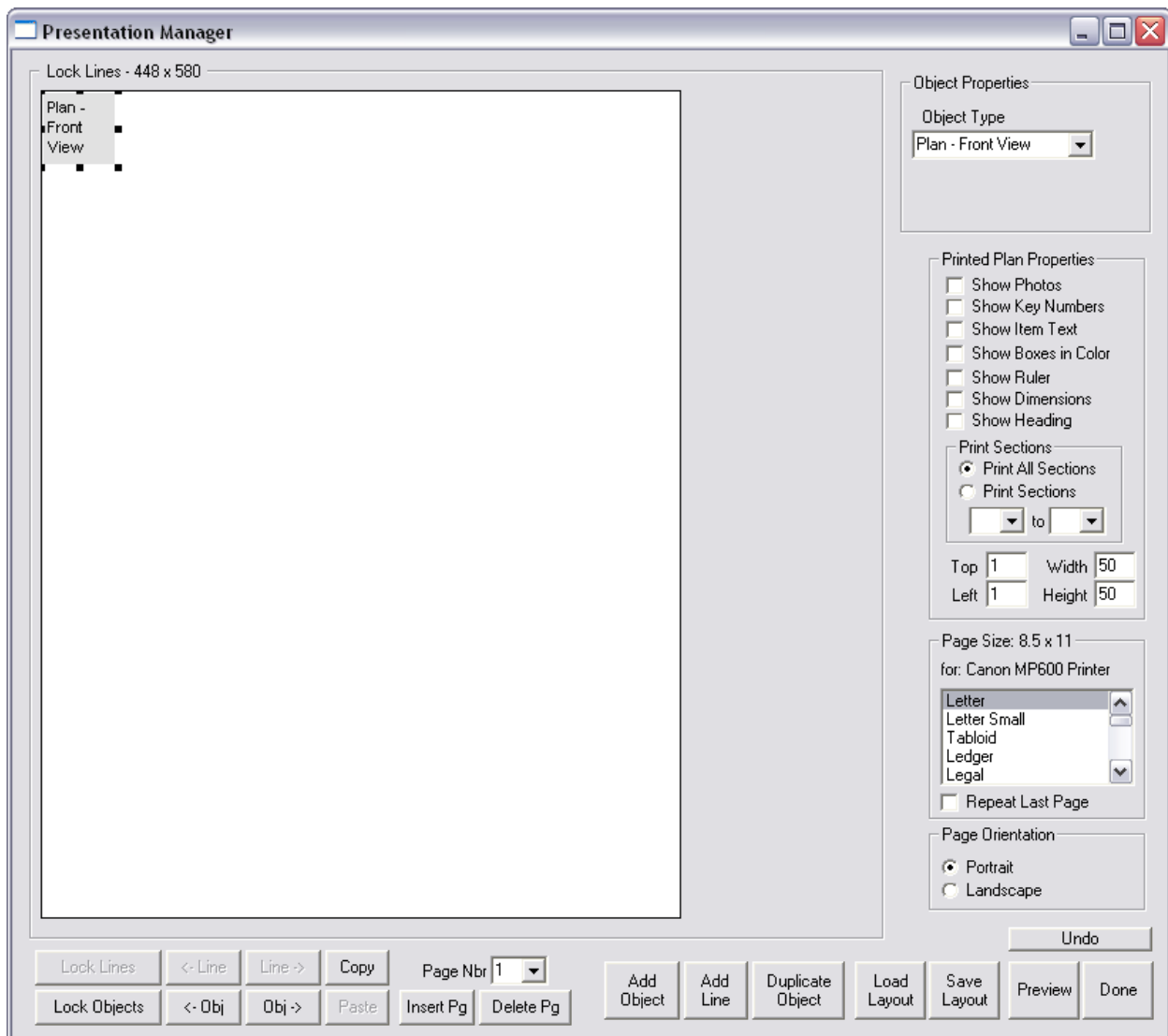
### ***Image***

This prints any photo image. You will need to enter the image name. The *Browse* button will let you search for the image.

### ***Plan Property***

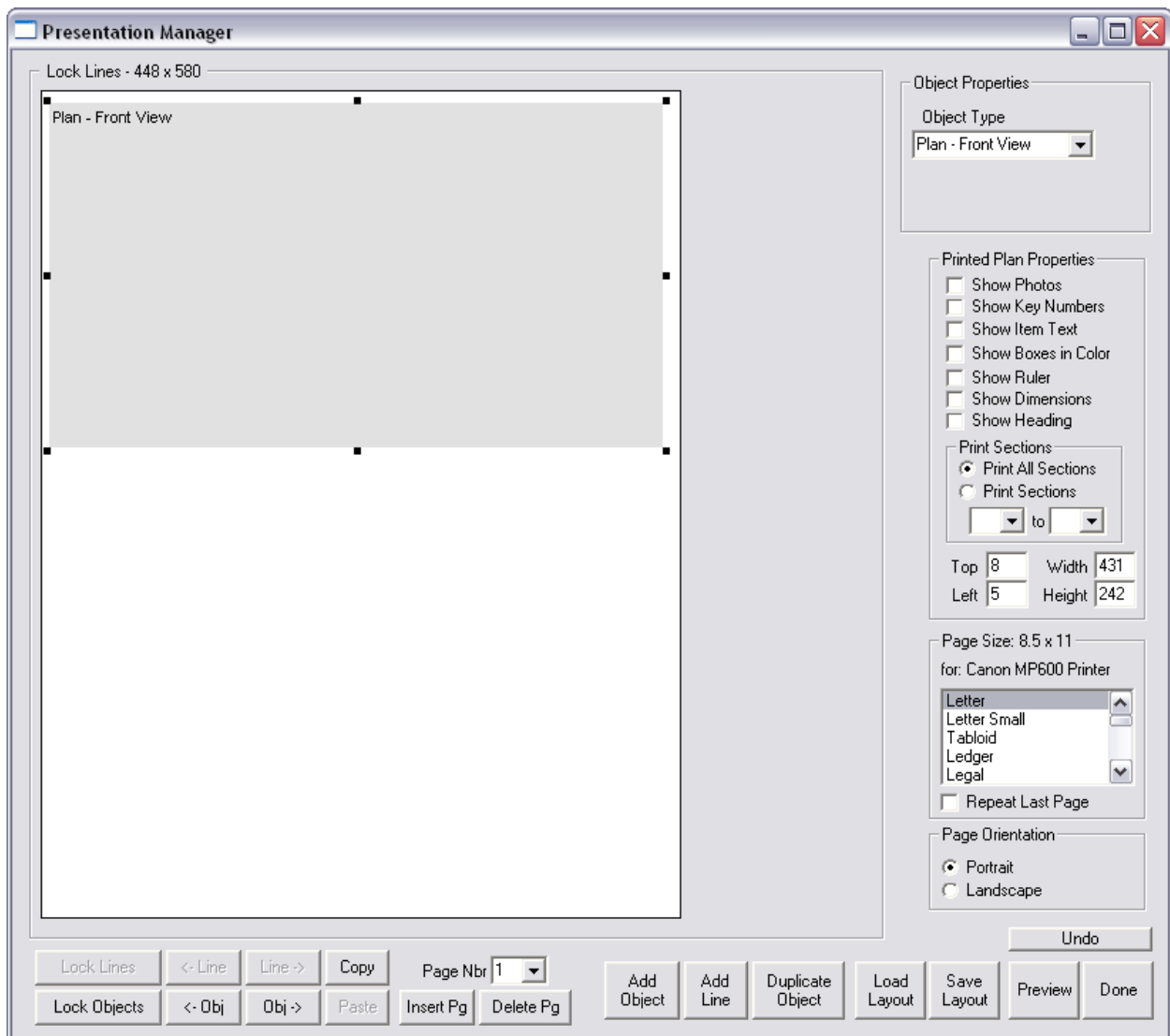
This can be any Plan Property entered through the Plan Properties selection on the View menu.

For our new object, we'll select "Plan – Front View", as shown in the figure below.



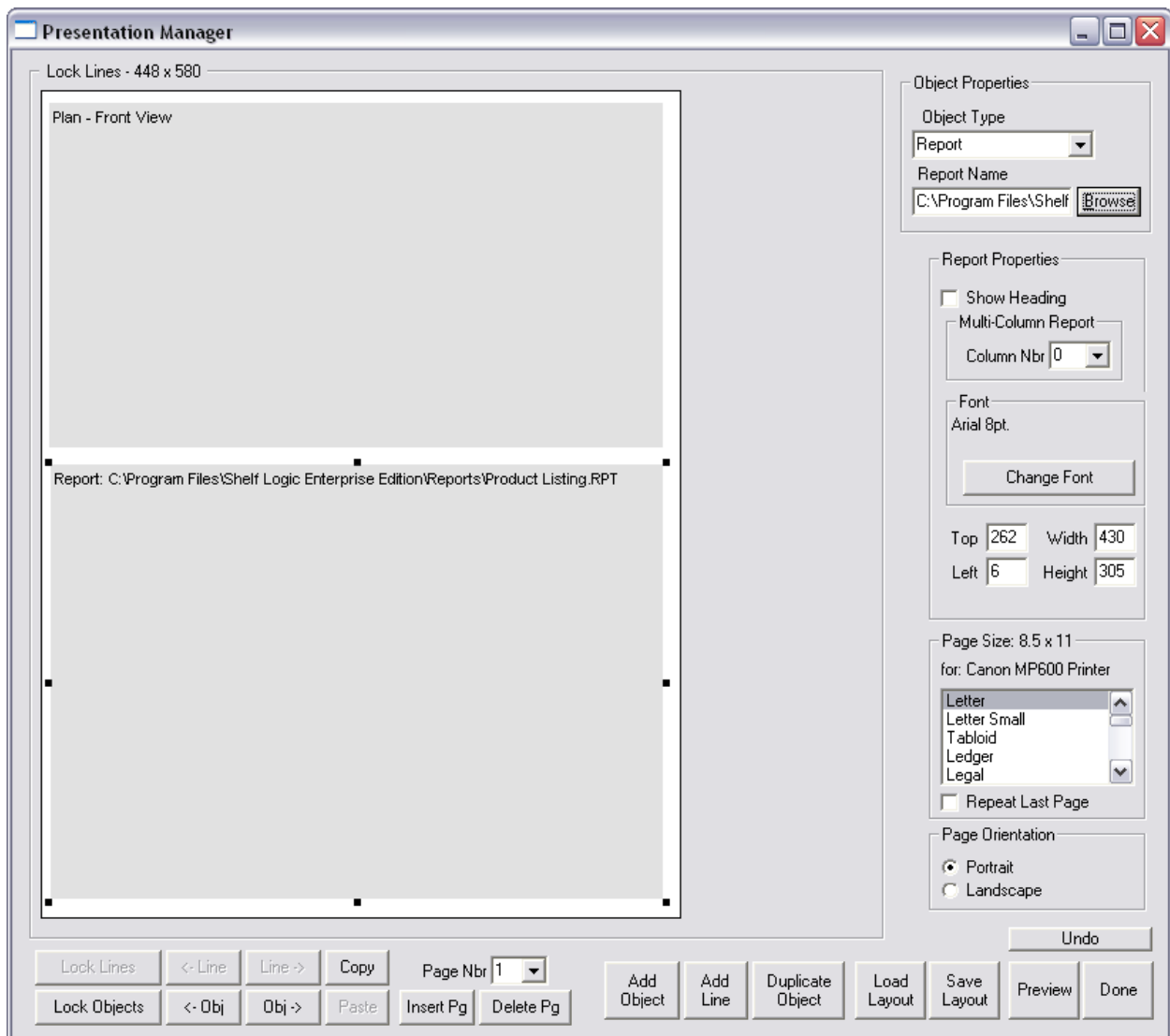
Notice on the right side is a list of plan properties that control what's printed. Each object type has a different set of properties.

Now we'll move and resize our object to fit in the upper half of the page, as shown in the figure below.



Jus click on the gray square to move it into position. Click on any small black square and you can drag with the mouse to resize the object.

Now let's add another object to our report. We'll click on the *Add Object* button and then resize the object to fit in the lower half of the page, as shown in the figure below.



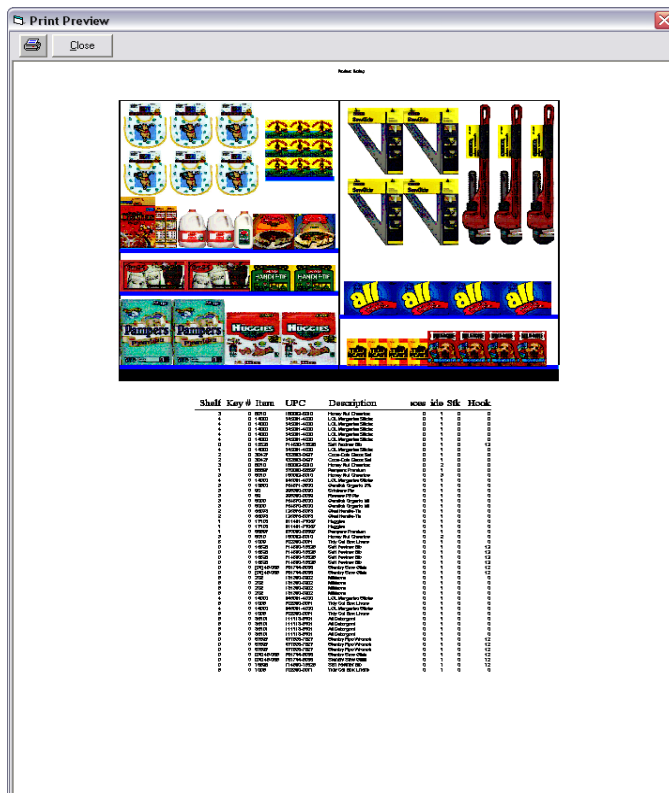
This object will be a report, the *Product Listing Report*, which shows what products are on the plan. We'll select report from the *Object Type* drop down list and then enter the name of the report below in the *Report Name* field.

Notice on the right side of the Presentation Manger window are the *Report Properties*. Each object type has its own properties that let you define various options. We'll cover these shortly.

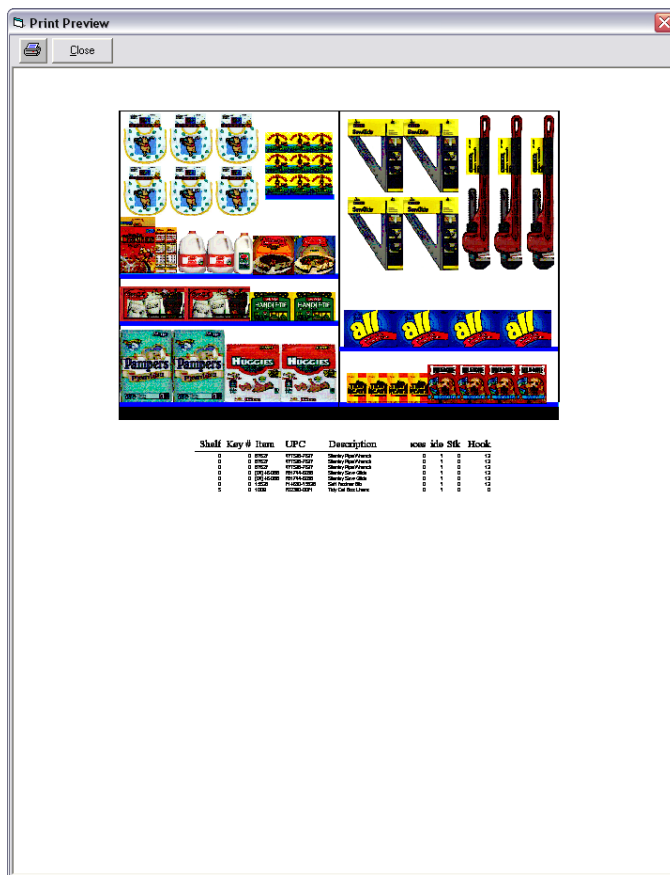


## Previewing the Report

Our report example is done and we can click on the *Preview* button to see what we get, as shown in the figure below.



The plan is displayed on the top of the page and the Product Listing Report is on the bottom half. If the Product Listing Report is longer than the allotted space, it can carry over to the next page if the *Repeat Last Page* checkbox is checked. If this is unchecked, then only the one page will print. In our example above, the Product Listing Report is too long for one page, so we check the Repeat Last Page and get a second page with the end of the Product Listing Report, as shown in the figure below.



## Line Objects

The Presentation Manager lets you put horizontal and vertical lines onto your report. These lines can be moved and resized, duplicated or deleted.

To add a line to the report, click on the “Add Line” button. Nothing will happen until you click somewhere on the report with the mouse,. A short horizontal line will appear under the mouse. You can then resize the line into a vertical line, box or a different sized horizontal line.

## Selecting Objects

You can select a single object just by left-clicking on it. When an object is selected, the small black handles are displayed around the object. Once the handles are displayed, you can click on a handle and change the shape of the object.

Objects can also be selected by clicking on the Next Object or Previous Object buttons. Line objects can also be selected by clicking on the Next Line or Previous Line buttons.

Once an object is selected, you can use the up, down, left or right arrow keys to move the object.

Objects can also be sized and placed exactly by entering the objects left and top position and the width and height. All of these are relative to the page size, which is display in the upper left of the layout window in pixels.

## Selecting Multiple Objects

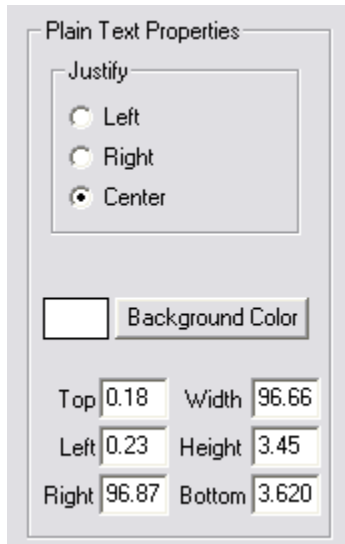
By holding down the SHIFT key while clicking on an object, you can select multiple objects. Once multiple objects are selected, you can move them together using the mouse or arrow keys.

# Object Properties

For each object on the report, there are a set of properties you can change to create various types of reports. To view the object's properties, click on it. These properties apply only to the selected object, not to all objects of the same type.

## ***Plain Text Properties***

This lets you print a line or paragraph of text.

A screenshot of a 'Plain Text Properties' dialog box. It has a title bar 'Plain Text Properties'. Inside, there's a 'Justify' section with three radio buttons: 'Left', 'Right', and 'Center'. The 'Center' button is selected. Below this is a 'Background Color' button with a small white square icon to its left. At the bottom, there are six input fields arranged in two columns. The left column has 'Top', 'Left', and 'Right' labels. The right column has 'Width', 'Height', and 'Bottom' labels. The values in the fields are: Top: 0.18, Width: 96.66, Left: 0.23, Height: 3.45, Right: 96.87, Bottom: 3.620.

### **Justify**

For Plain Text, you can justify the text left, right or center.

### **Background Color**

Clicking this button lets you select any color for the Plain Text's background.

### **Top, Left, Width, Height**

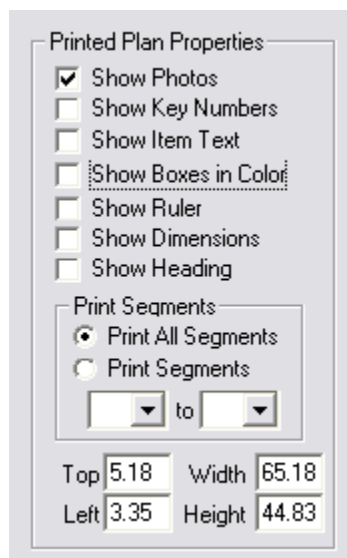
All object have these properties. They tell you the current position top and left, and the current size (width and height) of the object. All of these are measured in percentage of the total width or height of the paper.

### **Right, Bottom**

Some objects have the Right and Bottom properties. These better help you place small objects. All of these are measured in percentage of the total width or height of the paper.

## ***Printed Plan or Visual Sales Report Properties***

These are the options available when displaying the plan in front or side or when displaying a Visual Sales Report.

A screenshot of a software dialog box titled "Printed Plan Properties". It contains several checkboxes: "Show Photos" (checked), "Show Key Numbers", "Show Item Text", "Show Boxes in Color" (dashed border), "Show Ruler", "Show Dimensions", and "Show Heading". Below these is a section titled "Print Segments" with two radio buttons: "Print All Segments" (selected) and "Print Segments". Under "Print Segments" are two dropdown menus separated by "to". At the bottom are four input fields: "Top" (5.18), "Width" (65.18), "Left" (3.35), and "Height" (44.83).

### **Show Photos**

Checking this will show the product photo images

### **Show Key Numbers**

Checking this will show the product's Key Number

### **Show Item Text**

Checking this will show the chosen database information on the product. This works only when product photos are turned off.

### **Show Boxes in Color**

Checking this will show the product in it's selected colors. If unchecked, the product is displayed only as an outline. This works only when product photos are turned off.

### **Show Ruler**

Checking this will show the rulers next to the plan printout.

### **Show Dimensions**

Checking this will show shelf height measurements next to the plan printout.

### **Show Heading**

Checking this will show the plan heading, sub heading, segment headings and footing.

### **Print Segments**

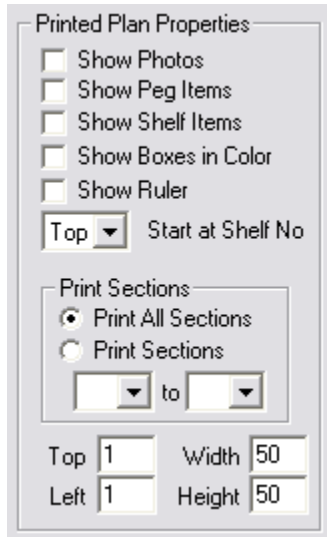
This lets you print all segments or selected segments. Choosing "Print All Segments" prints all segments and choosing "Print Segments" let you choose the starting and ending segments to print.

**Top, Left, Width, Height**

All object have these properties. They tell you the current position top and left, and the current size (width and height) of the object. All of these are measured in percentage of the total width or height of the paper.

## ***Printed Plan Top View Properties***

These are the options available when displaying the plan in top view. They are similar to the front and side view properties.

The image shows a software dialog box titled "Printed Plan Properties". It contains several options: five unchecked checkboxes for "Show Photos", "Show Peg Items", "Show Shelf Items", "Show Boxes in Color", and "Show Ruler"; a dropdown menu set to "Top" followed by the text "Start at Shelf No"; a section titled "Print Sections" with two radio buttons, "Print All Sections" (which is selected) and "Print Sections"; two empty dropdown menus separated by the word "to"; and four input fields for "Top", "Left", "Width", and "Height", all of which are currently set to the value "1".

### **Show Photos**

Checking this will show the product photo images

### **Show Peg Items**

Checking this will show only the pegged products

### **Show Shelf Items**

Checking this will show only the products on shelves.

### **Show Boxes in Color**

Checking this will show the product in it's selected colors. If unchecked, the product is displayed only as an outline. This works only when product photos are turned off.

### **Show Ruler**

Checking this will show the rulers next to the plan printout.

### **Start at Shelf No**

This determines the shelf number where the top view will start. For example if you indicate the bottom shelf, then the top view will show the bottom shelf. The default will show the plan from the top shelf.

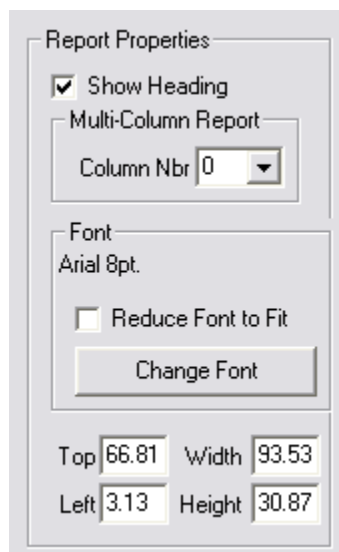
### **Print Segments**

This lets you print all segments or selected segments. Choosing "Print All Segments" prints all segments and choosing "Print Segments" let you choose the starting and ending segments to print.

### **Top, Left, Width, Height**

All object have these properties. They tell you the current position top and left, and the current size (width and height) of the object. All of these are measured in percentage of the total width or height of the paper.

## ***Report Properties***

The image shows a 'Report Properties' dialog box with a light gray background. It contains several sections: 'Show Heading' with a checked checkbox; 'Multi-Column Report' with a 'Column Nbr' dropdown menu set to '0'; 'Font' section showing 'Arial 8pt', an unchecked 'Reduce Font to Fit' checkbox, and a 'Change Font' button; and a bottom section with four input fields for 'Top' (66.81), 'Width' (93.53), 'Left' (3.13), and 'Height' (30.87).

Report Properties			
<input checked="" type="checkbox"/> Show Heading			
Multi-Column Report			
Column Nbr 0			
Font			
Arial 8pt			
<input type="checkbox"/> Reduce Font to Fit			
Change Font			
Top	66.81	Width	93.53
Left	3.13	Height	30.87

### **Show Heading**

Checking this will print the report's heading

### **Multi-Column Report**

This lets you create multiple columns for the report. Enter a number of 2 or more and make sure the objects shape can fit the columns requested.

### **Font**

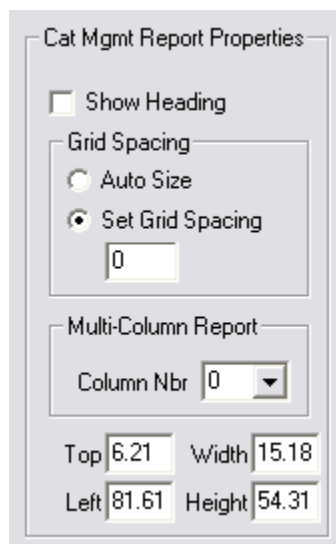
This lets you change the report font.

### **Top, Left, Width, Height**

All object have these properties. They tell you the current position top and left, and the current size (width and height) of the object. All of these are measured in percentage of the total width or height of the paper.



## ***Category Management Report Properties***



Cat Mgmt Report Properties

☐ Show Heading

Grid Spacing

☐ Auto Size

☒ Set Grid Spacing

0

Multi-Column Report

Column Nbr 0

Top 6.21 Width 15.18

Left 81.61 Height 54.31

### **Show Heading**

Checking this will print the report's heading

### **Grid Spacing**

This lets you choose if Shelf Logic should adjust the grid spacing or you can enter a spacing number yourself.

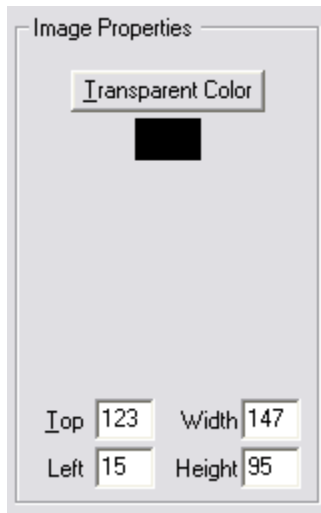
### **Multi-Column Report**

This lets you create multiple columns for the report. Enter a number of 2 or more and make sure the objects shape can fit the columns requested.

### **Top, Left, Width, Height**

All object have these properties. They tell you the current position top and left, and the current size (width and height) of the object. All of these are measured in percentage of the total width or height of the paper.

## ***Image Properties***



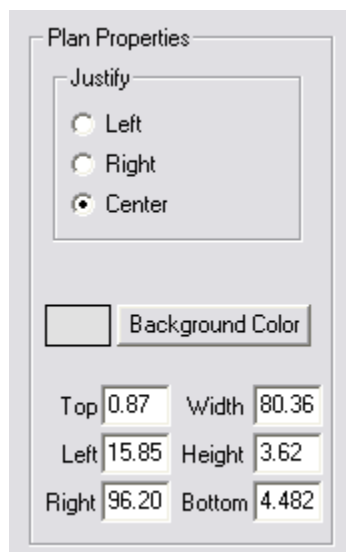
### **Transparent Color**

Clicking this lets you select a color for a transparent background.

### **Top, Left, Width, Height**

All object have these properties. They tell you the current position top and left, and the current size (width and height) of the object. All of these are measured in percentage of the total width or height of the paper.

## ***Plan Property Properties***



Plan Properties

Justify

☐ Left

☐ Right

☒ Center

Background Color

Top 0.87 Width 80.36

Left 15.85 Height 3.62

Right 96.20 Bottom 4.482

### **Justify**

For Plan Properties, you can justify the text left, right or center.

### **Background Color**

Clicking this button lets you select any color for the Plan Properties's background.

### **Top, Left, Width, Height**

All object have these properties. They tell you the current position top and left, and the current size (width and height) of the object. All of these are measured in percentage of the total width or height of the paper.

### **Right, Bottom**

Some objects have the Right and Bottom properties. These better help you place small objects. All of these are measured in percentage of the total width or height of the paper.

## Line Properties



The dialog box is titled "Line". It contains two radio buttons: "Line" (selected) and "Box". Below them is a color selection area with a black square and a button labeled "Color". At the bottom, there are six input fields arranged in two columns. The left column has fields for "Top", "Left", and "Right". The right column has fields for "Width", "Height", and "Bottom".

Property	Value
Top	9.14
Left	0.00
Right	100
Width	100
Height	1
Bottom	9.31

### Line or Box

When line is chosen, the actual line thickness in pixels is used for the line. When Box is chosen, the box or line is resized to scale and will be larger. So if you want a 2 pixel wide line, then choose line. If you choose box, the line will be scaled to the actual printout and will be much thicker than 2 pixels.

### Color

Clicking this button lets you select any color for the line or box.

### Top, Left, Width, Height

All object have these properties. They tell you the current position top and left, and the current size (width and height) of the object. All of these are measured in percentage of the total width or height of the paper.

### Right, Bottom

Some objects have the Right and Bottom properties. These better help you place small objects. All of these are measured in percentage of the total width or height of the paper.

# Presentation Manager Commands

## Duplicating an Object

Click on the desired object and click on the Duplicate Object button. An object with the same type and properties will be added to the report in the upper left.

## Deleting an Object

Click on the desired object and press the Delete Key. You will be asked to confirm the delete.

## Lock Objects

Clicking the Lock Objects button will lock all objects (that aren't lines) so they can't be selected or moved. Clicking this button again will unlock objects. This is handy if you're moving objects and don't want to accidentally move lines.

## Lock Lines

Clicking the Lock Lines button will lock all lines so they can't be selected or moved. Clicking this button again will unlock lines. This is handy if you're moving lines and don't want to accidentally move objects.

## Copy

Clicking the "Copy" button will put the selected lines and/or objects into a special buffer so they can be pasted at a later time.

## Paste

Clicking the "Paste" button will paste the copied objects and/or lines any page of the report. If you copy from one page to another, the pasted objects will appear in the same location.

If you copy and paste to the same page, then the objects and/or lines will be duplicated on top of the existing objects/lines.

## Delete Pg

This will delete the current page.

## Undo

Clicking the Undo button will undo the last move, add or delete or resize of object., copy paste or duplicate.

## Previous Line

Clicking on the "<-Line" button will select the previous line. Each time it's clicked, the selection will move to the previous line.

## Next Line

Clicking on the "Line ->" button will select the next line. Each time it's clicked, the selection will move to the next line.

## Previous Object

Clicking on the "<-Obj" button will select the previous object. Each time it's clicked, the selection will move to the previous object.

## Next Object

Clicking on the “Obj ->” button will select the next object. Each time it’s clicked, the selection will move to the next object.

## Arrow Keys

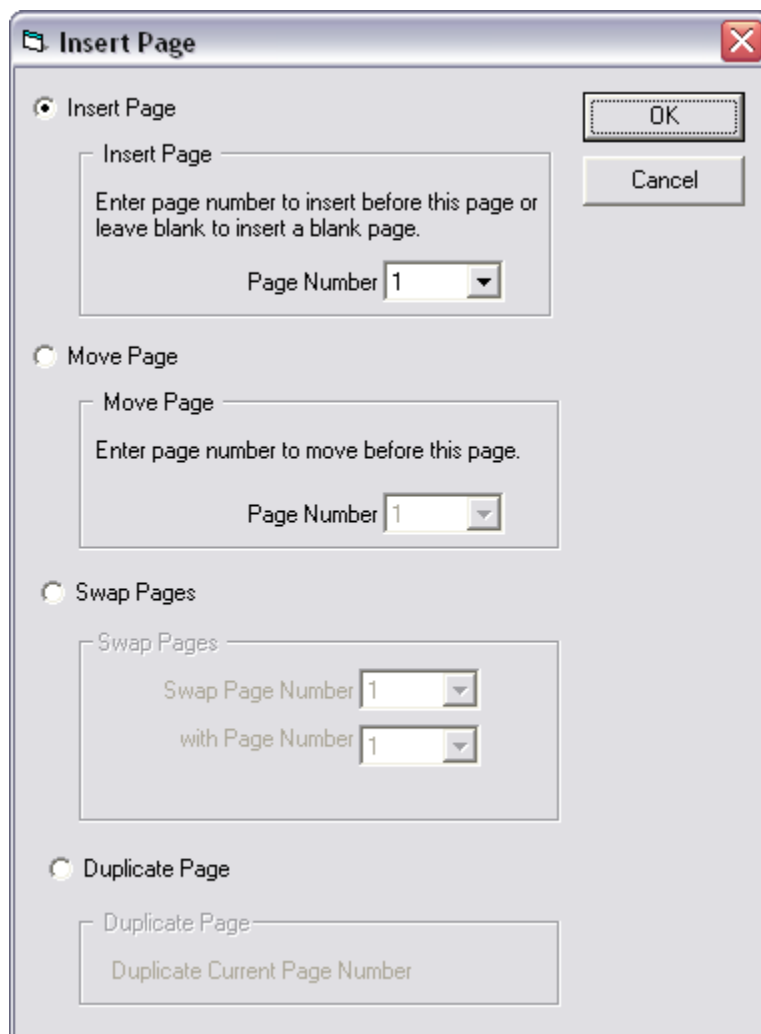
Once one or more objects are selected, the arrow keys will move them a slight amount each time the arrow key is pressed.

## Selecting Multiple Objects

Hold down the SHIFT key while clicking on an object will let you select one or more objects.

## Insert Pg

This will let you do a number of things. You can insert a blank page before the current page or copy a page before the current page. You can move a page before the current page. You can duplicate the current page or you can swap pages. When you click the Insert Pg button, you will see the screen displayed below.



The screenshot shows a dialog box titled "Insert Page" with a close button (X) in the top right corner. It contains four radio button options, each with a corresponding input field:

- Insert Page** (selected): The input field contains the text "Enter page number to insert before this page or leave blank to insert a blank page." and a dropdown menu showing "Page Number 1".
- Move Page**: The input field contains the text "Enter page number to move before this page." and a dropdown menu showing "Page Number 1".
- Swap Pages**: The input field contains two dropdown menus, the first labeled "Swap Page Number" and the second labeled "with Page Number", both showing "1".
- Duplicate Page**: The input field contains the text "Duplicate Current Page Number".

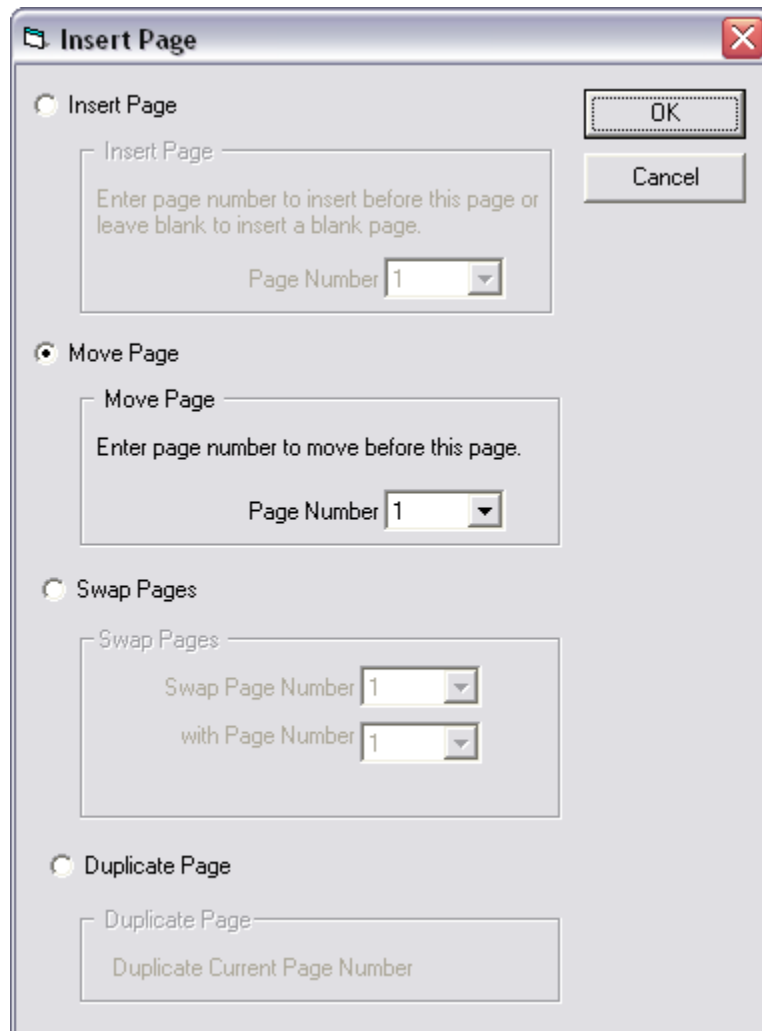
At the top right of the dialog box, there are "OK" and "Cancel" buttons.

## *Insert Page*

The Insert Page option lets you insert a blank page before any page, or leave the field blank to insert a blank page at the end.

## Move Page

The Move Page option lets you move the current page before any page, as shown below.



The image shows a dialog box titled "Insert Page" with a close button (X) in the top right corner. The dialog contains four radio button options: "Insert Page", "Move Page", "Swap Pages", and "Duplicate Page". The "Move Page" option is currently selected. Each option has a corresponding text box for input. The "Move Page" text box contains the instruction "Enter page number to move before this page." and a dropdown menu showing the number "1". The "Insert Page" option has a text box with the instruction "Enter page number to insert before this page or leave blank to insert a blank page." and a dropdown menu showing "1". The "Swap Pages" option has two dropdown menus, the first labeled "Swap Page Number" and the second labeled "with Page Number", both showing "1". The "Duplicate Page" option has a text box labeled "Duplicate Current Page Number". At the top right of the dialog, there are "OK" and "Cancel" buttons.

**Insert Page**

☐ Insert Page

Insert Page

Enter page number to insert before this page or leave blank to insert a blank page.

Page Number 1

☒ Move Page

Move Page

Enter page number to move before this page.

Page Number 1

☐ Swap Pages

Swap Pages

Swap Page Number 1

with Page Number 1

☐ Duplicate Page

Duplicate Page

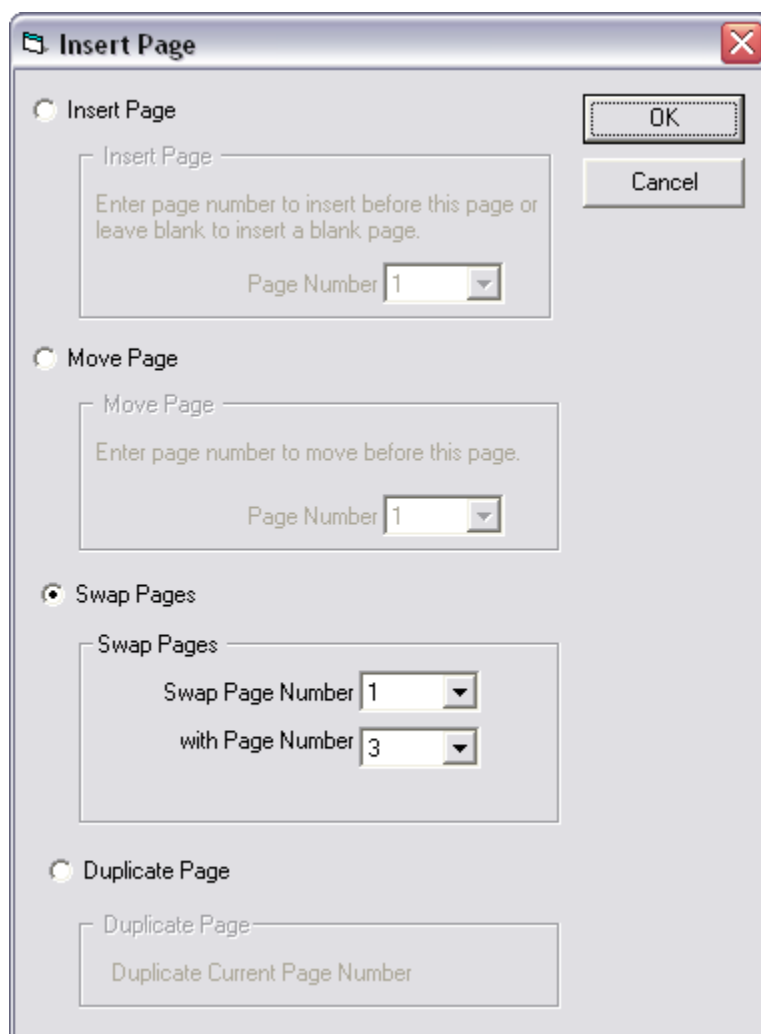
Duplicate Current Page Number

OK

Cancel

## Swap Pages

The Move Page option lets you swap page. Enter the pages to be swapped, as shown below.



The image shows a Windows-style dialog box titled "Insert Page" with a close button (X) in the top right corner. The dialog contains four radio button options: "Insert Page", "Move Page", "Swap Pages", and "Duplicate Page". The "Swap Pages" option is currently selected. Each option has a corresponding text box for input. The "Swap Pages" section contains two dropdown menus: "Swap Page Number" with the value "1" and "with Page Number" with the value "3". The "Insert Page" section has a "Page Number" dropdown with "1". The "Move Page" section has a "Page Number" dropdown with "1". The "Duplicate Page" section has a "Duplicate Current Page Number" text box. On the right side of the dialog, there are "OK" and "Cancel" buttons.

**Insert Page**

☐ Insert Page

Insert Page

Enter page number to insert before this page or leave blank to insert a blank page.

Page Number 1

☐ Move Page

Move Page

Enter page number to move before this page.

Page Number 1

☒ Swap Pages

Swap Pages

Swap Page Number 1

with Page Number 3

☐ Duplicate Page

Duplicate Page

Duplicate Current Page Number

OK

Cancel



## ***Duplicate Page***

The Duplicate Page option creates a duplicate of the current page and puts it after the current page.

## Saving A Presentation Report

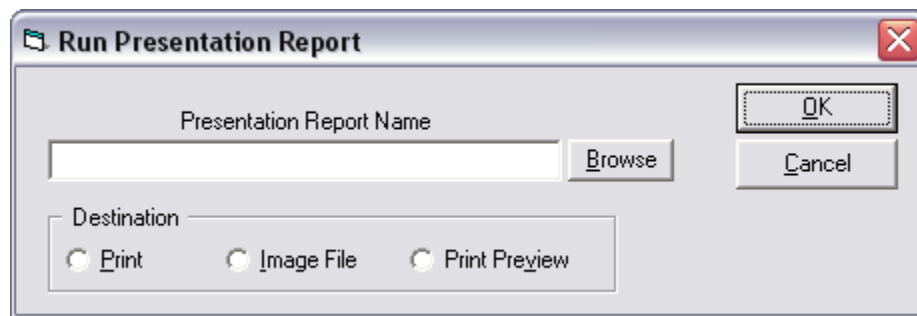
Clicking on the *Save Layout* button and give the report a name. It is suggested you keep all reports in the *Reports* folder. Reports must be saved before they can be run.

## Loading A Presentation Report

Clicking on the *Load Layout* button lets you load an existing Presentation Report.

## Running a Presentation Report

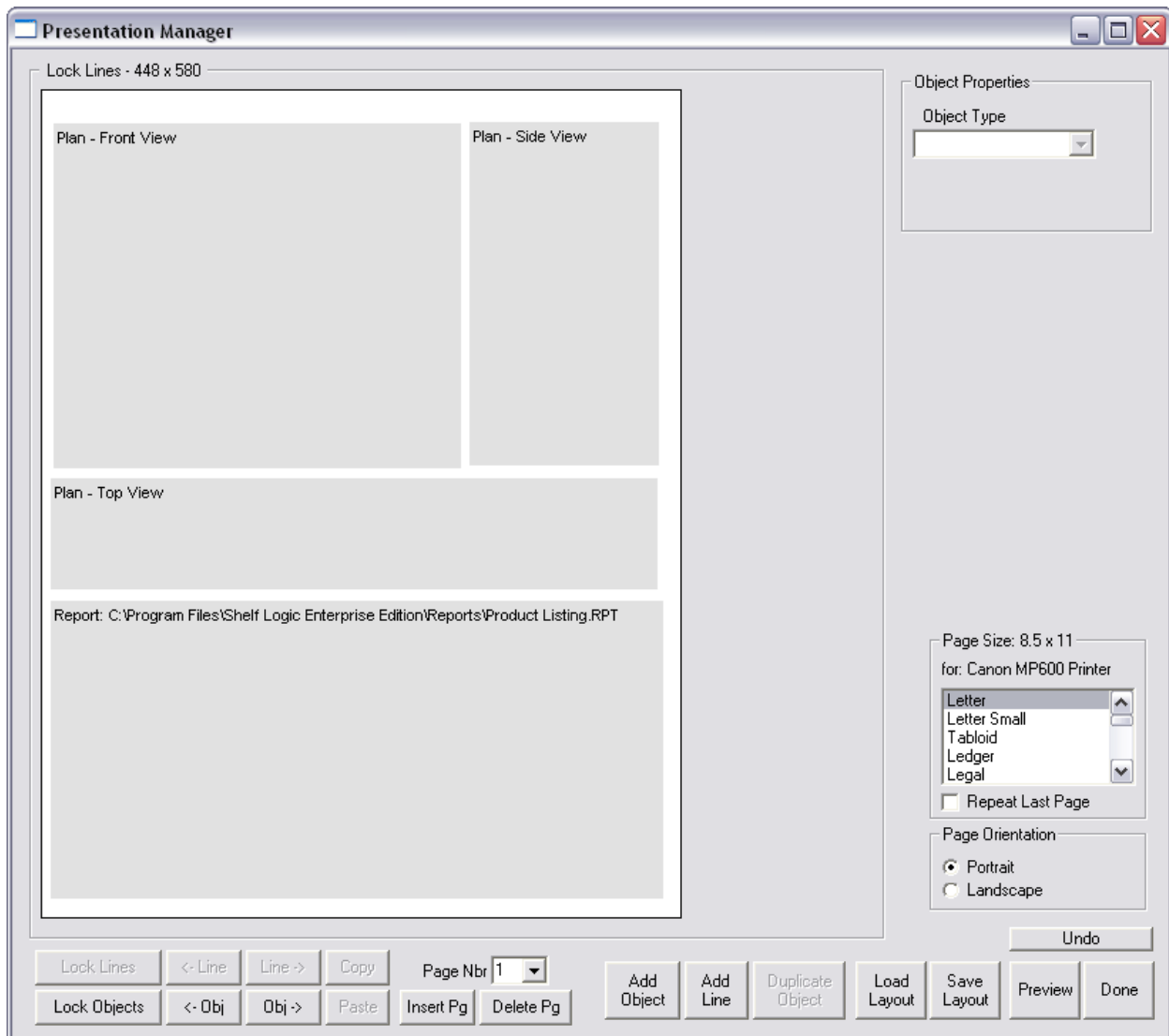
You can run a Presentation Report from the Report menu. Select “Presentation Manager” and then choose “Run Presentation Report”. You will see the following window.



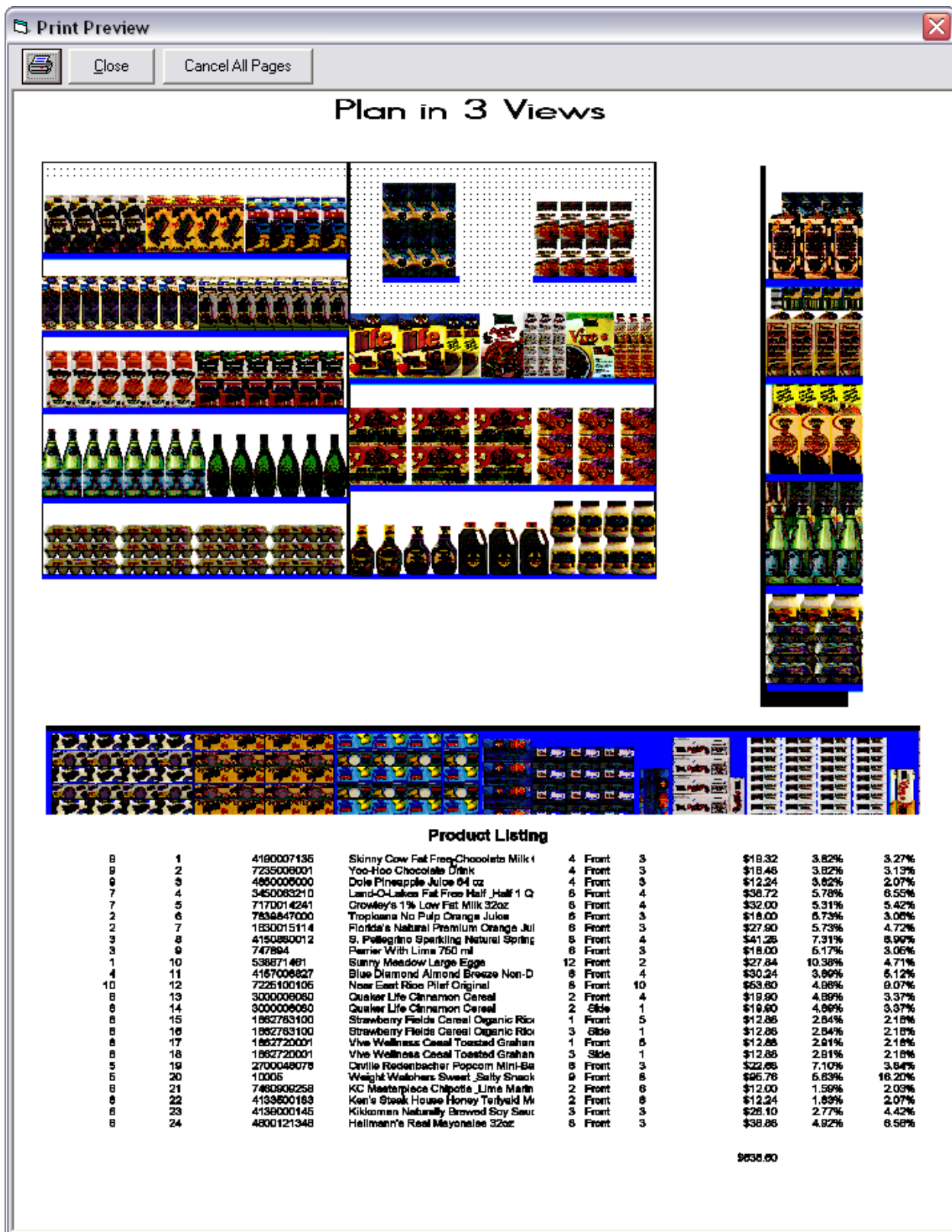
Enter the name of the Presentation Report or browse for it by clicking on the “Browse” button. Then choose the destination for the report. You can print it, create an image, such as a jpg or bmp file, from the report. Or you can preview the report. If you create an image from the report, you will be asked for a name for the image file.

# Examples

Our first example shows a plan in all 3 views and then displays the Product Listing Report. Let's look at the Presentation Manager window with our finished report. This is shown in the figure below.



On top we have a Plain Text object that gives us our heading. Below that is a front view and side view of the plan. Below that is a top view of the plan and below that is the product listing report. When run, the report will look like the figure below.

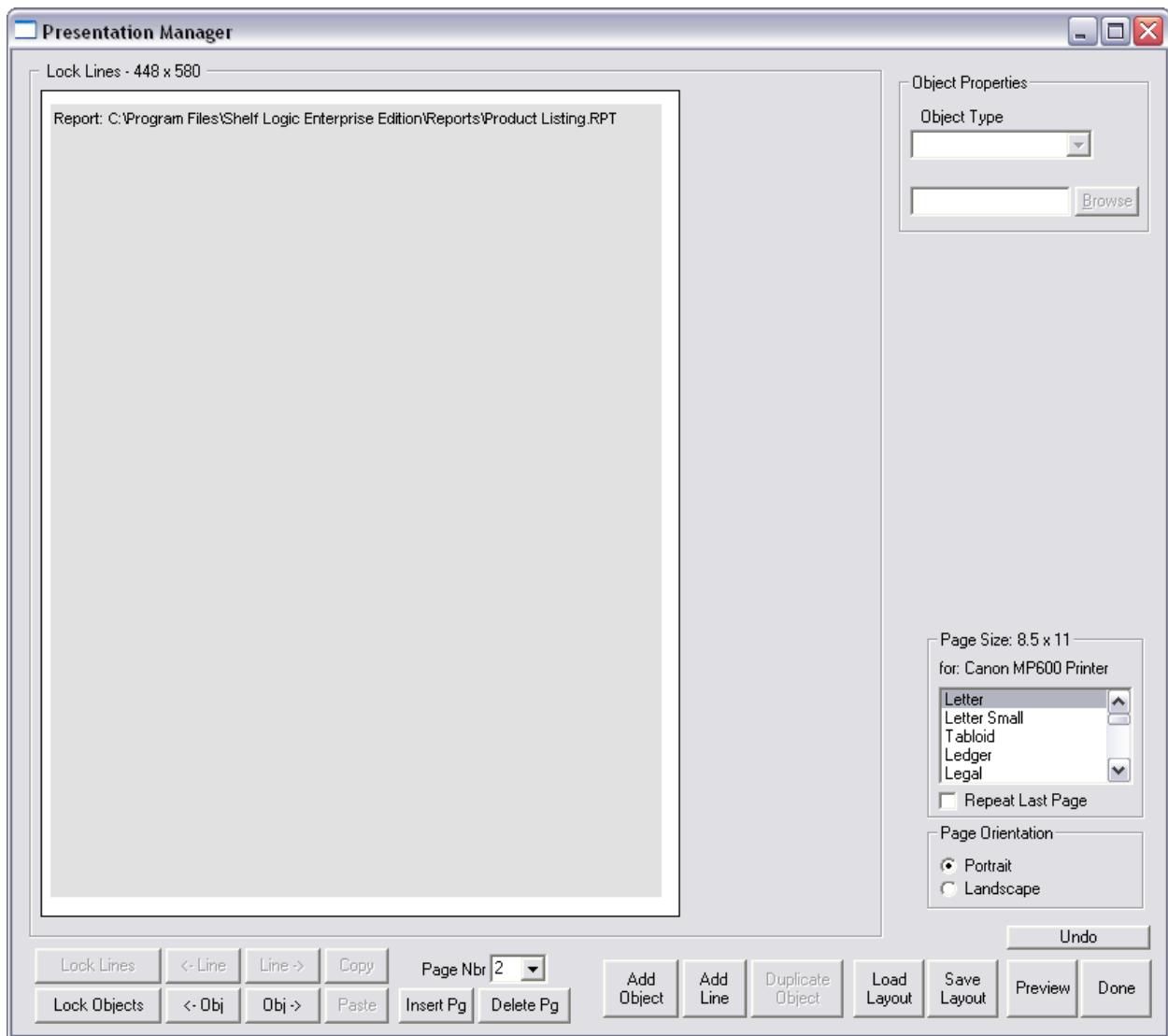


Since this is a one page report, there isn't enough room for the Product Listing report to finish. We could correct that by checking the "Repeat Last Page" checkbox, which is shown in the figure below.



This means that the report will print multiple times until the report is finished. With each page, the Product Listing report will print as many lines as will fit and then continue the report on the next page. The only problem with this is that the plan printouts will also appear on the page along with the Product Listing report. Each page will look like the one above with the exception that the Product Listing report shows different lines of information (it continues from the previous page)

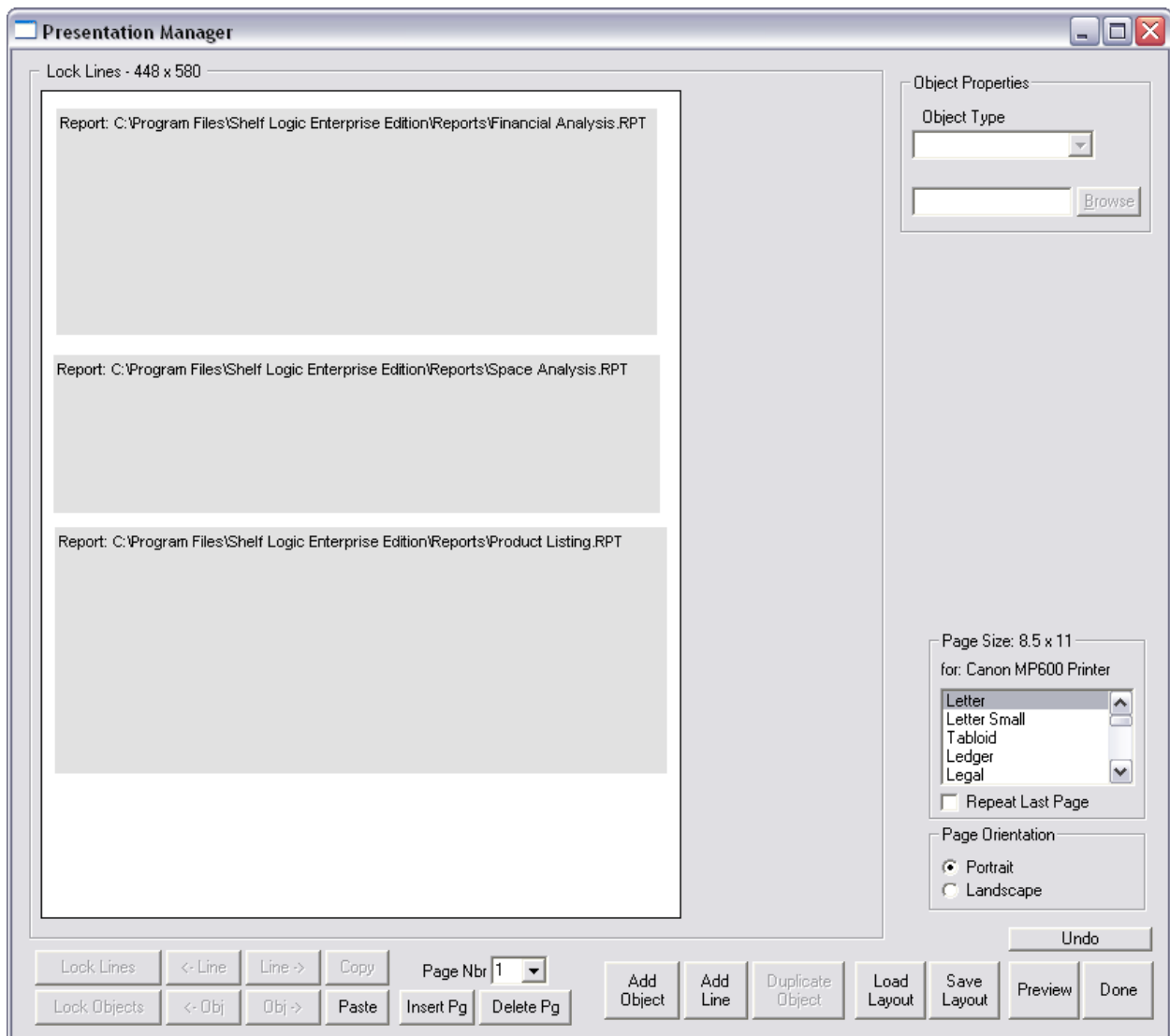
Another solution is to use page two for the Product Listing report and let that page repeat until the report is finished. The Product Listing report from page one will continue onto the Product Listing object on the second page. In the figure below, we have created a second page and create a report object and assign the Product Listing report to it.



You can see the *Page Nbr* is “2”. We have created one object on page two and assigned it the Product Listing report. When this report is run, the first page will print, followed by the second page, followed by as many page two’s as needed to finish the Product Listing report.

Here’s what the report might look like:





We have three reports on page one, which is also the last page. The *Repeat Last Page* option is checked so page one will repeat until all reports have been printed. This might look like the pages below:





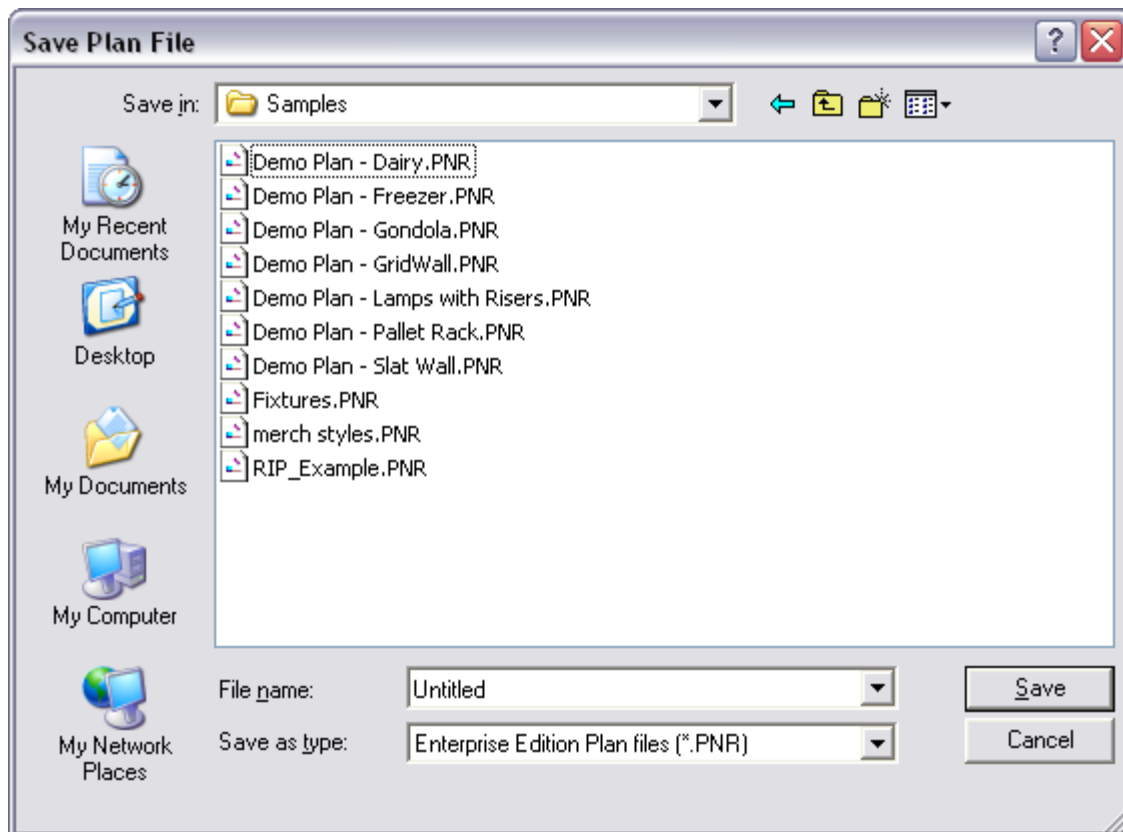
## Saving Plans

### Name and Save a New Plan

Menu: File/Save  
 Keyboard Shortcut: <Ctrl + S>

We recommend naming and saving a new plan as soon as you have defined the layout, and also performing frequent saves throughout your work session. This will prevent the loss of your work should an operating problem or user error occur.

After executing one of the above commands, the standard Windows File Save dialogue box will open as shown below. You should accept the default save location In reply to: the DataFile folder.



**Figure 35. Save Plan**

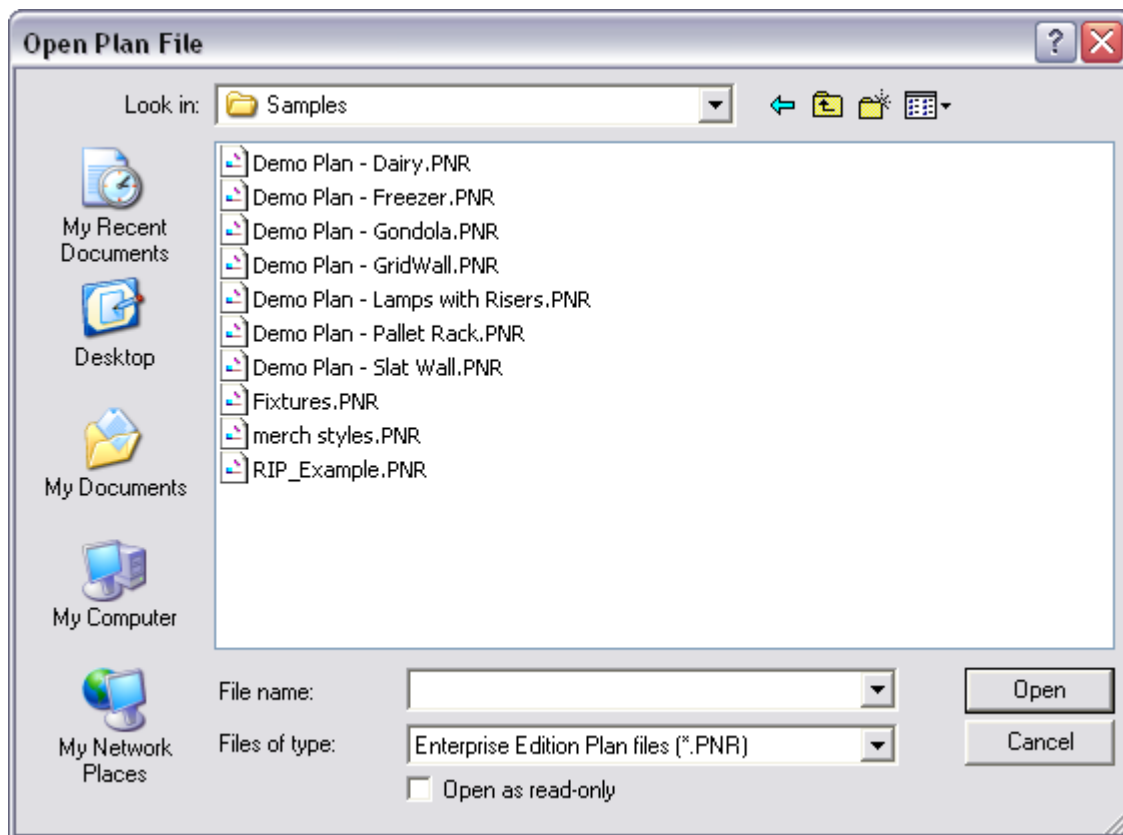
Enter a file name for the new plan. Long files names are acceptable. Do not include the period and 3-letter extension in your file name. The file extension of .PNR will automatically be added by Shelf Logic® Enterprise Edition. Click the OK Button to save the file.

You can use the Save as type plldown to choose the format for the saved file. You can select .PNR for Enterprise Edition format, or .PSA for Prospace or .PLN for Spaceman formats.

## Opening an Existing Plan

Hot Button: Open  
Menu: File/Open  
Keyboard Shortcut: <Ctrl + O>

Once you have named and saved a plan, you can reopen it for editing at any time. After executing one of the above commands, the standard Windows Open File dialogue box will open as shown below. Select a plan from the list in the left window and click the OK Button to open it. The database used to create this plan will also open.



**Figure 36. File Open Dialog Box**

## Opening Files from Other Planogram Programs

You can use the Files of type pulldown to select the type of plan file to open. Choose .PNR for Enterprise Edition format, .PSA for Prospace format, .PLN for Spacemans format, or .ICP for Intercept format.

When opening files other than .PNR Enterprise Edition files, you will be asked for a name for the destination database. Enter one or just accept the default database used.

## Saving a Copy With a New Name

Menu: File/Save As

After making changes to an existing planogram, you may want to save the changes in a new file, leaving the original planogram unchanged. This is a good way to make several different versions for comparisons. By saving your plan frequently under different names you can always revert to an earlier version.

After executing the above command, the standard Windows Save As dialogue box will open. Enter a new file name in the File Name box. Long file names are acceptable. Do not add the period and 3-letter extension. Click the OK button to save the file. The original file will close and the newly named file will become the active planogram file.

## Closing a Plan

Hot Button: Windows Close Button

Menu: File/Close

You can close a plan using the above menu command, or by clicking on the standard Windows Close button located at the upper right corner of the Plan Window.



**Note:** *Be sure to select the Close button on the Plan Window and not the application window if you want to continue working in Shelf Logic® Enterprise Edition.*

The above command will close the current planogram file. If you have any unsaved changes, an alert box will open with the following message: "Changes have been made to your current plan. Do you wish to save it first?" Clicking on "Yes" will open the Save Plan dialogue box, where you can save the planogram under the current name or enter a new name. Clicking on "No" will close the plan without saving any changes.

## Deleting a Plan

Menu: File/Delete

You must have the planogram file open before executing the above command. This command will completely remove the planogram file from your hard drive. It will no longer exist on your computer and will not appear in the Windows recycle bin. Before deleting the plan, an alert box will open asking you to confirm the deletion. This command is not reversible.

# Exiting Shelf Logic Enterprise Edition

Hot Button:	Windows Close Button
Menu:	File/Exit

You can exit Shelf Logic® Enterprise Edition using either the above menu command, or by clicking on the standard Windows Close Button located at the upper right corner of the Shelf Logic® Enterprise Edition application window. Clicking this button will close the Plan Window, the Items Window and the Main Program Window.

If there are any unsaved changes, an alert box will open with the following message: "Changes have been made to your current plan. Do you wish to save it first?" Clicking on "Yes" will open the Save Plan dialogue box, where you can save the plan under the current name or enter a new name. Clicking on "No" will close the program without saving any changes to the open plan. The Shelf Logic® Enterprise Edition application window will also close.

# Performing Backups

We strongly recommend performing frequent backups of your Shelf Logic® Enterprise Edition Datafile folder. If your computer is connected to a network, consult your System Administrator about including Shelf Logic® data files in the system-wide backup. If you are working on a stand-alone computer, you will need to backup or copy the files to a removable medium, such as a floppy disk, zip disk, CD or tape backup.

The following files should all be backed up and are located in **C:\Program Files\Shelf Logic Enterprise Edition\Datafile** folder:

Each plan will have up to four data files.

- .pn1 - Contains information about the items in your plan.
- .PNR - Contains information about the plan layout.

If you have done manual Key Numbering, you will have this file:

- .PNK – Contains information about Key Numbering

If you have notes for a plan:

- .PNN – All of the Notes for a plan

Each database will have one file:

- .mdb - Database file

If you have saved a filter:

- .FLR – Contains item filtering information for each filter saved

If you have created and saved Smart Plan Setup files:

- .SPS - Smart Plan for Shelves Setup file
- .SPP - Smart Plan for Peg Setup file

If you have imported or exported your database:

- .csv - Excel import/export files

If you have imported or exported your Sales Quantities File:

- .csv - Excel import/export files

If you have saved your plan as an image:

- .BMP - Plan Image
- .JPG - Plan Image

If you have created readers files for use with Shelf Logic® Enterprise Edition Reader Software, the zipped files will be located in the **C:\Program Files\Shelf Logic Enterprise Edition\Reader** folder:

- .ZIP – Compressed reader files

## Automatic File Backup

Shelf Logic® Enterprise Edition will prompt you to make a backup of your plan file each time you close a plan. If you select “yes”, you can then enter a file name and location for the backup.

You will also be asked to make a backup of your database each time you close the program. If you select “yes” you can then enter a file name location for the database backup.

All other files must be backed up manually. Automatic backup prompts can be turned on and off from the View Menu/Preferences section and are turned on by default.

## Types of Printouts

Shelf Logic<sup>®</sup> Enterprise Edition provides four types of printouts. In addition, there are several options to choose from that make the basic printouts very flexible.

### Planograms

This is the graphical layout of your display, which is automatically scaled to fit the selected paper size and orientation specified in Printer Setup. The planogram can be printed using line art or photo images. Printing the planogram is covered in this section.

### Statistical Reports

These are the standard Shelf Logic<sup>®</sup> reports which are generated and printed from the Reports Menu.

### Sales Analysis Planogram and Reports

The sales analysis planogram colors items according to sales levels. Corresponding reports are printed from the Sales menu.

### Graphic Image

The planogram can be exported and printed as an image file. This file can then be used with other programs and applications.



# Print Options

## Printer Setup

Menu: File/Printer Setup

Upon executing the above command, the Printer Setup dialogue box will open. Each printer model will have a slightly different dialogue box and available options; however, the options you will need to specify for a Shelf Logic<sup>®</sup> Enterprise Edition printout are available in all Windows printers:

- Select the default printer or specify a different printer.
- Select the appropriate paper size.
- Select portrait or landscape mode.

Portrait mode prints with the longer page dimension running top to bottom. Landscape mode prints with the longer page dimension running left to right. Which mode you choose will depend upon the specific plan and personal preference.

# Print Planogram

Hot Button: Print  
Menu: Reports/Print Planogram or Print Shelving Schematic  
Keyboard Shortcut: <Ctrl + P>

Executing one of the above will open the Print Plan dialogue box with all print options, as shown below.

**Figure 37. Print Planogram Options Screen**

**OK** – This will print the plan on the current printer.

**Cancel** – This cancels the printing.

**Print Preview** – This displays a screen showing you what the printed plan will look like.

**Plan Type** – Select product for a product report or shelves to see only the shelves.

**Print to Image File** – This will create a bitmap or jpg image of the plan, up to 6000x6000 pixels, which will yield a very large hi resolution print.

**Advanced Options** – This display another window where you can select various printing options.

**Printing Options are as follows:**

**Orientation** – Select portrait or landscape mode.

**Resolution** - You have a choice of two resolutions when printing a plan. The “Good” setting prints quicker but the quality of images is not as good as the “Best” setting. The “Good” setting

produces a printout 1000 pixels by 1000 pixels. The “Best” setting produces a printout 3000 pixels by 3000 pixels. There may be cases where there isn’t enough memory to print using the “Best” setting. In this case, either use the “Good” setting or use the “Print to Image File” button to print a large image to a bitmap or jpg picture.

**Graphic Options** – Selecting the Line Art option will print the items as boxes and custom shapes (where applicable). Selecting the Images option will print the items as photographic images, provided that an image file was entered into the items database.

**Printing Segments** - This option lets you print one or more segments of the planogram. Select “Print all Segments” to print the entire planogram. Select “Print Segments” to print one or more segments. Then select a starting and ending segment. If you want to print one segment, make that segment both the start and ending segments.

**Print Item Text** – By selecting this option, items will print on the planogram with Item Number, Item Name, and Key Number. Deselecting this option will print items with a Key Number only. The option you select will depend upon the individual planogram. Small items print better without text.

**Print Boxes in Color** - Deselect this option if you are using a black and white printer.

# Advanced Printing Options

## Printing Text On Items

**Print Key Number Only** – Checking this will print only the key numbers in the product boxes. No other text will print.

**Print Item Text Over Image** – Checking this will print the item text over images as well as in the product boxes.

**Transparent Text** – Checking this will make the item text print transparently over the product box. If not checked the text is printing on a white background. This white background is only as large as the text area.

## Key Numbering

**Combine Item Key Numbers** – This very useful option, if checked, will treat all product grouped together as a single product when displaying the key number and item text. If you have 9 faces of an item grouped together, then one key number will be assigned and the item text will run across all 9 items. This is useful when you have small items that may be too small to display the item text. Even though many items can be assigned to a single key number, on the product listing, the number of faces within the key number is displayed.

**Shelf Key Numbering** – Normally, automatic key numbers are assigned from top to bottom, left to right within a segment. This works for peg items but not always for shelf item. If you check this option, then items on the shelf are automatically key numbered from left to right, top to bottom. Key numbering for peg items remains the same.

**Start Numbering in Segment** – This is used when you print one or more segments rather than the entire display. When segments are printed, then key numbering normally starts at the beginning of the display. So, for example, if you print only segment 2, then the numbers you see don't start at one but start after the last key number in segment 1. So the first number displayed could be 10 or 15, etc. but not 1.

If you check this option, then the key numbering starts at 1 in the first segment printed. So if you print starting at segment 2, then key numbering starts at key number 1.

## Text Orientation

*Auto* – If this is selected, then text is printed horizontally if it will fit. If not, then the text is printed vertically if the item is taller than wide.

*Horizontal Text Only* – Selecting this will print the text horizontally only.

*Vertical Text Only* – Selecting this will print the text vertically only.

**Print Display Background Color** – Checking this will print the displays background color.

**Suppress Footing** – Checking this will prevent the footing from appearing on the plan printout.

**After selecting the appropriate options, click the OK Button to print, or the Cancel Button to cancel printing and return to the main Shelf Logic® screen**

### Segment Headers and Footers

Menu: Reports/Headers & Footers

You have the additional option of creating a separate header or footer for each segment of shelves on your planogram. Upon executing the above command, the Shelf Segment Header and Footer box will open as shown below:



The screenshot shows a window titled "Segment Headers & Footers". On the left, there is a list box labeled "Segment #" containing the numbers "1" and "2", with "1" currently selected. To the right of this list box are two text input fields. The top field is labeled "Header" and contains the text "Section 1 Dairy". The bottom field is labeled "Footer" and contains the text "Section 1 Footer". On the right side of the window, there are two buttons: "OK" and "Cancel".

**Figure 38. Segment Headers & Footers**

This list box will display the segment numbers as defined in the Display Setup. Click the appropriate segment number and enter a header and/or footer. As you click on each segment number on the left, the headers and footers will clear so you can enter new ones for each segment. Click the OK Button to accept, or the Cancel Button to cancel. Shelf Segment Headers and Footers will appear on the printed planogram only.

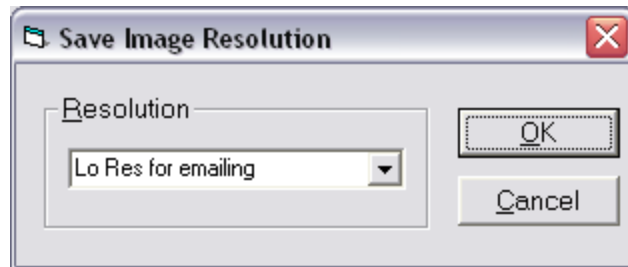
## **Print Peg Holes**

You can control whether or not background peg holes print on your final planogram by turning them on or off from the View Menu. If there is a checkmark in front of the Show Peg holes option, the peg holes will be visible on screen and will print on the planogram. Deselecting Show Peg holes will turn them off for both the screen and printed planogram.

# Printing the Planogram as a Graphic Image

From the Print Dialog, there's a button that lets you save the plan as a graphic image.

After executing the above command, the following dialogue box will open. Heading and Sub Heading are optional.



**Figure 39. Create Image File**

In the Resolution combo box, you can select from 12 different resolutions, ranging from actual 500 pixels wide to 6000 pixels wide. The larger the number of pixels, the better details is obtained when printing and the larger the print size can become.

A high-resolution image will create a superior printout but creates a very large image file. A low-resolution file is more suitable for emailing and web pages, where the image will only be viewed on screen.

After clicking OK, a standard Save File dialogue box will open. Graphic files can be saved in several formats including .bmp, .jpg, .esp, and .tif.

## Printing the Planogram to an Adobe Acrobat PDF File

The planogram and reports can be printed to a PDF file provided you have the full version of Adobe Acrobat software installed and not just the free reader software.

1. Select File Menu/Printer Setup.
2. Select Acrobat PDF Writer or Acrobat Distiller – click OK.
3. Select File Menu/Print Plan and print as usual.

**Note:** PDF Writer will create a PDF file using standard default settings. Distiller allows you select advanced features and settings. Consult the Adobe Acrobat documentation for details.

